

# **Keys to Successful Leadership Transitions**

**David J. Gyertson, Ph.D.**  
**ABHE Board Governance Coach**  
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## Overview

Leadership transitions at every executive level are fraught with risks. What are the principles to be formulated and best procedures to be practiced for passing the baton with clarity, grace and continuity?

- Understanding inherent risks in leadership transitions
- Charting a prudent course for getting started
- Knowing the difference between rash and prudent decisions

# EXCELLENCE IN BOARD GOVERNANCE

## The Acceleration of Executive Leadership Transitions

- Current leaders are “aging out” at an increased rate
- More leaders are “burning out” due to multiple factors and unanticipated demands
- Leadership roles are “scaling up” demanding different skills and models than in the past causing incumbents to step away and/or Supervisors/Boards to facilitate changes.

## Transition Risks

- Dilution of legacy essentials and loss of institutional memory – note value of exit briefings
- Slowing of missional momentum
- Assuming current job description of departing leader is sufficient for what's needed next
- “Married” to finding a leader just like (or not like) the one leaving
- Not discerning the impact on corporate morale and culture and mediating the impact
- Mismanaging fears and/or misperceptions about leadership change by subordinates
- Not considering the expectations of direct reports and colleagues impacted by a new leader
- Being too slow or too quick with the decision.

## Major Steps in Transitioning Executive Leadership

## Transitioning Steps

- Transition policies and procedures established well in advance
- Assessing the organization's readiness for the next leader
- Deciding on whether interim leadership may be needed to resolve significant issues or provide a buffer zone for the acceptance of a new leader
- Determining the leadership priorities – what worked before may not work with what is before you

## Transitioning Steps

- Understanding the essential elements of “fit” with the organization’s mission and culture
- Identifying the experiences and skill sets the position will require
- Establishing the performance metrics needed to measure leadership effectiveness

## Transitioning Steps

- Defining the search and selection process thoroughly
  - Who makes the final decision on the selected candidate?
  - Who will be involved in defining the leadership essentials, interviewing candidates and recommending finalists?
  - How will the search be conducted (search firms, self-directed, facilitated by a consultant)?



## Transitioning Steps

- Ensuring that the departing leadership is appropriately acknowledged/celebrated.
- Implementing a comprehensive “on-boarding” process for the new leader.
- Shepherding the leader through the first year with regular feedback on key performance expectations and measures of effectiveness.

# EXCELLENCE IN BOARD GOVERNANCE

## Leadership Transitions - Special Circumstances

- Unexpected Departures.
- Managing leaves of absence
- Incapacitation or Death of the Leader.
- Performance failures leading to dismissals or requested resignations.
- Moral/ethical failures

## Both Appointed and Anointed

- The critical role of spiritual discernment for all involved
  - Acts 15:28 It seemed good to the Holy Spirit and to us
- The undergirding responsibility of prayer
- The assurance that those whom God calls He also equips
  - I Thes. 5:23-24 Now may the God of peace himself sanctify you completely, and may your whole spirit and soul and body be kept blameless at the coming of our Lord Jesus Christ. 24 He who calls you is faithful; he will surely do it.

## Questions, Comments and Discussions

Note: David Gyertson's  
“Successful Leadership Transitions”  
document available in the ABHE Resources Library