

# Reflections on Succession: A Personal Perspective

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By Dr. Hal M. Lewis

Within the next several weeks I will officially step down from the CEO post I have held for the past ten years at a major educational institution. In a nonprofit environment that is often as cutthroat and “dog-eat-dog” as the corporate arena, I am proud to report that my departure is 100% scandal-free. No drama, no mystery, no backstory. Stepping down from the Presidency of my institution was entirely my decision and one I reflect upon with pride. While I normally eschew personal reflections as too egocentric and idiosyncratic, I am hopeful that by sharing some of my experiences I can be helpful to others who find themselves exploring similar issues related to executive transition.

Perhaps, because I never wanted the CEO role to begin with, I never fell into what I call the Louis XIV trap, in which executives often become convinced that, as old King Louis once said, “L’etat c’est moi.” (I have written more about the very real challenges executives face in contemplating transition in my blog post, *Planning for Success(ion)*.) In my case, I knew that the Institute I served had a long history before my tenure and I am confident that its influence will continue long after I step down. It never occurred to me that my decade of service was oversized or determinative. To be sure, I am proud that we overcame a number of challenges and accomplished several important things but I see my tenure as a single decade among many, and nothing more; a link in a chain that is much larger than I am.

Four years ago, when I first raised the issue of stepping down to my Board Chair and Executive Committee, I did so because I believed then (and now) that it was right for both my organization and for me. I had assumed the helm during a very rocky and uncertain period both financially and programmatically. The early years of my tenure were characterized by the need to make difficult (often painful) decisions that dramatically reduced our organization’s programmatic footprint in order to survive economically. It is not an exaggeration to say that we spent many of those early years in extremis. No organization can survive if crisis is its sole defining character, and fortunately, our story (too long to enumerate here) has a happy ending. But it became clear to me along the way that a very different set of skills was required to lead the enterprise after the “turnaround” had been completed.

Leaders must understand the importance of what is often referred to as “situational leadership.” There are times when a leader’s skills are perfectly suited to the needs of her organization. Those very same skills, however, may not reverberate with equal resonance in a different agency or at a different time within that same company. Just as human beings evolve and change over time, so do organizations. (See

## Nonprofit Lifecycles: Stage-Based Wisdom For Nonprofit Capacity and The Five Life Stages of Nonprofit Organizations: Where You Are, Where You're Going, and What to Expect When You Get There.)

Underlying this contention, of course, is the obligation leaders have to know themselves, to accurately assess their assets and weaknesses, and to respond accordingly. The fact that we had become a financially viable enterprise with a new brand, and a senior staff capable of propelling the organization forward, meant that it was time to step aside in favor of others with different skills.

Lest I sound like a martyred altruist, this decision was driven equally by a belief that my best interests would be served by moving on as well. Proud as I am of the past ten years, there are other things I want to do professionally, none of which include being a “hanger-on.” Moving to something new is always more satisfying than lingering beyond one’s time, however self-gratifying that may seem in the moment. The ability to separate self from role and to define oneself as more than one’s title is key to effective leadership. I don’t mean to suggest that my experience of 10 years at the top is the right timeframe for everyone; only that succession planning is a leader’s responsibility whenever the timing is right.

Despite the successes, my presidency would have been a failure had I decided to walk away without laying the groundwork for someone to come after me. As Peter Drucker famously taught, “There is no success without a successor.” In my own case, I promised my board that I would spend time during the period of my last contract identifying, preparing, and mentoring a potential candidate to become the Institute’s next CEO. It was always clear that I could not guarantee the outcome of those discussions but I have worked hard (as has my eventual successor) to effectuate a seamless transition. Many new chief executives step into their role without knowing who’s who and what’s what in the organization (even if they’ve been on staff for a while). In contrast, my successor and I developed a detailed transition plan that included a gradual expansion of his duties and the opportunity for him to meet and work with trustees, donors, and community leaders, long before walking into the C-Suite.

While some long-serving CEOs often admit to being threatened by a newer, younger successor, I am, in a word, elated. Given the enormous investment of psychic and physical energy that informs any presidency, particularly one characterized by extreme challenges, I am comforted and encouraged that our next CEO is poised to pick up the baton and run much further than I could ever imagine. In this regard, I have learned another valuable lesson. Simply stated, succession planning is not cloning, or to again quote Drucker, “carbon copies are weak.” Whatever talents and skills I brought to this job are not the same ones that will propel us into the next decade. Just as I was different from my predecessor, my successor will be and should be different from me. And that is a very good thing.

I do not worry that my vision will be abandoned or my legacy tarnished. The very leadership I have sought to bring to the agency demands that things change going forward. Stepping down from the top post is made infinitely easier by the fact that I trust my successor to find his own path in an uncertain future. That is what leaders do. And to be succeeded by a leader is the greatest legacy of all.

Perhaps more than any single attribute, the key to effective succession planning is humility. Too often, humility is misunderstood as weakness or self-effacement. Nothing could be further from the truth. Humility allows a leader to ask wise questions, to make good decisions and to empower others, recognizing that no single individual has all the answers. Humility is also the essential ingredient in planning for effective transitions. When a leader believes that he alone is capable of steering the enterprise, or that without her the company will fall apart, then the very idea of succession planning is likely to be avoided entirely. And this, I am sorry to say, is often what happens. Call it Founder's Syndrome or its functional equivalent, incumbent executives often resist contemplating the future of the organization without them. And the truth be told, their boards are often equally as reticent to focus on the need for change at the executive level. Because I never wanted to be defined by my job alone, I never wanted my organization to be defined by me as its sole executive.

Effective leadership is about building organizations that outlast us. The oft-heard suggestion that "this place would fall apart without me" is an indictment of the highest order, not the statement of outsized influence many believe it to be. Leading humbly and making way for others requires a degree of confidence and security that is the furthest thing from weakness.

In sum, I offer these concluding thoughts for those organizations or individuals ready to engage in the succession planning process:

Leadership is not solipsism. We lead for others not for ourselves.

Valuable as our tenures may have been, we are not our organization and who we are is not the same as what our title is.

Humble leaders are not weak leaders. Humble leaders see well beyond themselves, while weak leaders cannot get out of their own way.

Only those who provide for the future leadership needs of their organization can rightfully be called leaders themselves.

Legacies are determined by others, not by us. And in any event, they rarely last forever.

As leaders, our job is to build organizations that outlive us, even if they look very different from the ones we left.

After ten years as the CEO of Spertus Institute, Dr. Hal M. Lewis will be stepping down from the Presidency in June. He will continue to serve Spertus as Chancellor. A prolific writer and popular teacher on leadership, Dr. Lewis has recently been invited to join the Faculty of the Center For Creative Leadership in Greensboro, NC. His new nonprofit leadership practice, Leadership For Impact LLC serves the needs of nonprofit executives and their boards, with a focus on executive coaching, crisis management/turnarounds, working with boards, and succession planning. He can be reached at [hlewis@leadershipforimpact.com](mailto:hlewis@leadershipforimpact.com).