

Succession of a Generation

Statistics show that approximately 70% of all businesses fail to survive their first generation of founder and 85% fail by the third generation. Family expectations, intertwined businesses, economic surprises, and challenges make the succession process unique for each organization. Succession is a topic that I have been asked about since I was 30 when folks realized we were having a baby boy. Succession is not something Ironwood has had much experience at, yet we realize we see it happening all around us. In effect, we are all interim leaders. Crucial to the next step for our ministry is a process called succession. In its best form, succession is not a milestone moment but a slow, unfolding process. Described below is the Ironwood plan of succession.

Succession Elements

OWNERSHIP

God owns it all today and forever. Our succession plan must keep one thing constant: Our desire to obey and glorify God. Many things may change, but our hope across generations should be that each person be a steward of the talents, time, and treasure that God has given us.

GOVERNANCE

The board must look to replace itself with a team of individuals who understand the philosophy of ministry and financial intricacies and will carry on missional and financial accountability for the leadership team of the ministry.

LEADERSHIP

Succession is far from just picking a new Executive Director. Effective succession will involve a plan to transition three to five major leadership positions and create a new team ready to work together for the next generation.

EMPLOYMENT

One of the hardest elements is the transition of workers (team members) who go from working for someone older to working for someone younger. This requires time, patience, and humility.

STAKEHOLDERS

Stakeholders (i.e., campers, churches, and donors) will transition with new leadership, but many will have their own succession problems and opportunities. New generations will require new relationships that must be built with campers, churches, and donors.

STEWARDSHIP

An understanding of what is being transitioned in terms of stewardship is necessary to make good decisions in the future. A systematic approach to transitioning knowledge to the next generation will include teachers and students from multiple generations dealing with the following topics:

- History
- Financial
- Program
- Strategic and competitive advantages
- Future opportunities
- Philosophy
- Property
- Process
- Negatives, problems, and difficulties

Generational Responsibility

Our ministry is strongest when we have generational representation in every area. We are also strongest when each generation is passing on responsibility to the next generation (give or take five years on any start or stop time) and not trying to do the work of two generations in one. Crisis of succession happens when one generation holds on too long in any one of these successions and a generation is lost.

- 0–20—learning, growing, and choosing a life direction
- 20–40—prime time of energy/learning: working, ideas, change; gaining experience in a wide variety of areas; responsibility turns into expertise
- 40–60—prime time of production; leadership, teaching, team effort
- 60–80—prime time of wisdom; sharing, wisdom, concentrated effort
- 80–100+—prime time of encouragement; hope, reminder of God’s work, and a model of trusting God in everything

Succession of a Generation: Staff Leadership

Ironwood is three to five years away from the beginning of an eight- to ten-year leadership succession. The past ten years have seen a revenue plateau and a camper shrink. We have improved our operational capabilities during this time when we have not had any capacity pressures. We have explored a number of ministry efforts (e.g., multi-camp, family of camps, serving churches and pastors, young adult training, and several new camp programs) that have been mostly successful. Although we have an older, seasoned staff who have spent a lifetime in camping, we also have a new generation of team members. We have not added a staff member over age 30 for the past 10 years as we have made a concerted effort to add new young staff while continuing to grow and teach our older team. Financially we have no long-term debt, and we are working hard to keep up with depreciation. The age of the property has caused us to invest heavily in maintenance and repair. Leadership Live, Summer Staff, Institute of Ministry, and Ministry Bound have provided the ministry with a good bridge of relationship to a younger generation.

WHO

Identify succession candidates for everyone over 50 on the team director level.

WHEN

At the 2024 Board Meeting, deliver a list of names and a finalized plan of succession for the following few years. Design to have the flexibility to adjust a year or two but not to allow it to keep being pushed out. Finish goal of no later than February 2035.

HOW AND WHAT

This could get really complicated; the available books and templates would make it easy to generate an 80-page document. This is designed to be compact and doable without bureaucracy, but with structure that helps us move forward and communicate a plan.

1. **Assemble a succession team**—founder, executive director, team directors, candidates for each spot, and two to four additional members (e.g., stakeholders, board members, employees) who know the process; they need to be people who are connected to lots of other people so that input/criticism/advice will flow to the succession team.

2. **Schedule seasonal meetings**— the succession team will meet for a short time three times a year on property; each meeting will have deadlines and assigned homework and will include training, a review of history, and a discussion about the future and our preparation for the future.
3. **Create a “15 List”**—each team leader creates a list that encompasses everything his job includes; responsibilities may need to be combined or split to get exactly 15. *Due at 2024 Board Meeting.*

Executive Director 15 List

1. *Philosophy maintenance and growth—Morning Meeting*
2. *Staff Training and orientation of staff team*
3. *Defined and Ministry Bound*
4. *Finances and fundraising*
5. *Project planning*
6. *Spoke ministries*
7. *Program*
8. *Sponsors and adult ministry*
9. *Calendar (events and speakers) and priority*
10. *November Planning Meetings*
11. *Communication to pastors, staff, and everyone*
12. *Staff recruiting, hiring, firing, and evaluations*
13. *Resident Staff Manual*
14. *Family of Camps, Tweakage, Avalanche*
15. *Operations Team*

Senior Program Director 15 List

1. *Management of the Program Team and the relationship of Program to other teams, including crossover teams*
2. *Maintain and teach the position and philosophy of Ironwood*
3. *Encourage and participate in creativity and innovation in each aspect of programing*
4. *Oversee health and safety*
5. *Oversee horses*
6. *Oversee stores*
7. *Oversee documentation (evaluations, safety, summer staff, stores)*
8. *Oversee recruiting*
9. *Oversee promotions*
10. *Oversee the processes needed to serve churches well, deadlines for camp coordinators, etc.*
11. *Oversee maintenance and inventory of all program activities, equipment, and supplies*
12. *Oversee music*

13. *Oversee fellowship areas and meeting rooms including sound, video, and stage; keeping them distraction free*
14. *Oversee and hold the quality, style, and standard for camper handouts, nametags, screens, etc.*
15. *Oversee the planning and management of Program projects*

Financial Director 15 List

1. *Business team training*
2. *Accounts payable*
3. *Accounts receivable*
4. *Credit*
5. *Budgeting*
6. *Retention and filing*
7. *Insurance*
8. *Government*
9. *Financials communication*
10. *Banking*
11. *Payroll and employment details*
12. *Assets*
13. *Chart of accounts*
14. *Scholarships*
15. *Month and year-end updates and reconciliation*

4. **Develop leadership “Big 5”**—for each position in leadership transition, the succession team develops a Big 5 of the essential skills or character needed for the position (all skills/character are an outflowing of an individual who wants to obey and glorify God with his life and life work); the goal is to recognize that unique jobs may have unique requirements, not to make such a huge list that no one qualifies. *Due at 2024 Board Meeting.*

Executive Director Big 5

- *Good communicator of truth and principles—trusted by others and able to interact well with people.*
- *Good theological base—not still figuring out what he believes or thinks, history of theological stability.*
- *Love for the soul of people—humble, cares about pastors, moms and dads, kids, and employees.*
- *Able to make a decision—seeks good counsel, listens then works hard to follow through on decision.*
- *Constant learner and willing to change if needed.*

Senior Program Director Big 5

- *Loves God and is called to camp ministry—know and love God and His Word and know and love the philosophy of Ironwood's program.*
- *Loves people and is kind—humility and kindness to co-workers and campers, able to love the future of both and understand when to be firm and when to be flexible, able to love and work with other teams within the Ironwood team.*
- *Loves details but sees the big picture—cares for the details of every aspect of the program from handouts to safety without losing sight of the whole, caring about documenting the past and planning for the future.*
- *Dedicated to helping people succeed—teacher with patience and insight, helping people discover and develop their gifts, adapting strategies to help others succeed.*
- *Creative and curious—love of learning and planning, not just the research of it but also implementing and doing*

Financial Director Big 5

- *Spirit-filled—be an example of one who is guided by godly principles and is Spirit-filled (Genesis 41:38).*
- *Good steward—understanding that all belongs to God and can be trusted to increase our margin for ministry; choose to be accountable to godly leaders and advisors.*
- *Patient teacher—taking into consideration everyone's sense of business, can give clear communication to both the business team member and other staff of those business matters; know where to place people, to grow them spiritually and to give time to them.*
- *Business savvy—a degree in business or solid experience in business office skills and knowledge; gives good attention to and has astute awareness of details; competent.*
- *Joyfully flexible—whenever the time calls for, they will be needed in other areas of the ministry and must not have a 9–5 mentality; accessible, approachable, and available.*

5. **Identify and interview candidates**—the executive director and team director meet with the candidate, review the Big 5 and 15 List, and see if the individual is interested in this type of work in the future; explain the slow process of succession and reality that God may have a different plan that we are not knowledgeable of. *List of five names due at 2024 Board Meeting.*
6. **Little Handoff (2024–2029)**
 - a. Pick one item off the 15 List and take one year to hand off that responsibility to the succession candidate. After five years, the candidate should have one-third of the job and be ready for the next step.
 - b. Communicate the transition to all staff, volunteers, and stakeholders as needed. By the end of the year of each little hand off, the candidate should be doing the work; the team director will oversee, advise, and help but not run it.

7. **Big Handoff** (2030–3035)

- a. Pick two items off the 15 List and take a year to transition those two responsibilities.
- b. Evaluate the 15 List. Should all the areas currently on the list be the candidate's responsibility? Should any items be added to the list? Our organization today is based on the talents and abilities of the present team. Transition means the new team will have different talents and abilities. During the Big Handoff phase, the organizational chart may also change.
- c. The final year or two will result in a director who has the title but is only doing a small percentage of the work. This will be an excellent time for him to make some difficult changes, perfect some processes, and help the succession candidate rollout any improvements.

Note: Ideally the Little Handoff and Big Handoff would take eight to ten years to accomplish. However, the transition could be done in two to three years if necessary. The first year would transfer one 15 List item every two months. At the end of the year, the annual succession evaluation will determine if the candidate is a good fit. If so, the remaining responsibilities on the 15 List would be handed off two at a time every three months or so.

8. **Annual Succession Evaluations and Goals**—annually at the Board meeting, submit a plan for Little Handoffs and Big Handoffs and a State of Succession paragraph for each succession in progress.

- a. How the candidate is doing as he takes over responsibility
- b. How the Team Director doing as he gives away responsibility
- c. Sense of hope or concern for the future of this succession
- d. One area that needs to be addressed in the next year for this succession to continue to succeed

9. **Celebrate a Completed Succession**—happens when the last area that needs to be given away is actually given away.

- a. Clear communication to everyone is necessary in this process—completed succession will require new habits of communication and dealing with problems, especially for the employees and stakeholders.
- b. Appreciate the hard work and contribution of both the individual taking over the responsibility and the one giving it away. If this has been a process, the day after the celebration won't be much different than the day before it. Ironwood continues to obey and glorify God.

Succession of a Generation: Board Leadership

We are at an interesting time where we run the risk of making our founders gap permanent. With the passing of Chuck Chastain and Lee Brock, we have lost half of the original Triple BC crew. Walt and John Brock have been board members from the beginning. The founders have done an excellent job of recording and sharing the reasons why we do what we do. We are fortunate as a team to have such a rich heritage of philosophy. In the next few years, our board will transition from a board with a sitting founder to a team that has only heard or read the stories of the past. We have a unique succession in front of us. Can we train, teach, and share with a younger generation the principles and truths that have served us so well for over 40 years. Yes, we do have offspring of founders and folks who have a long history and deep interest in the ministry. What do we need to do to have a good succession of generations in the area of governance?

WHO

Identify succession candidates for everyone on the Board over age 70 by the 2022 Board Meeting or Board members who think they may only serve another three to five years.

WHEN

At the 2022 Board Meeting, submit a list of possible board succession candidates (age 35 to 50) that the Board can invite one by one to Board Succession of a Generation.

HOW AND WHAT

1. **Founders and present Board members create a five-year curriculum** to teach new leadership candidates and new Board members—the goal would be to cover topics crucial to bringing Ironwood to its place today from its start in 1973, to minimize the founder’s gap, to teach ongoing philosophy growth, and to help new Board members absorb and understand Ironwood’s extensive philosophy of ministry.
2. **Bring new Board candidates in before the Board meeting** for a four-hour discussion of philosophy of ministry. After the Board meeting, conduct a two-hour debrief of the topics the Board meeting covered. Founder and Executive Director will do the teaching; current Board members are welcome to participate and give input. Invite newer Board members to join the meetings. *Begins with 2023 Board meeting.*
3. After the first year of attending the philosophy and debrief meetings, **expand the Board size to allow the new Board member to sit with a veteran Board member** and vote, learn, share, see the Board work, and work with them. When a veteran Board member chooses to retire, a new Board member will have completed succession, and the Board can shrink back to its original size. *Begins with 2024 Board meeting.*
4. The curriculum created by the founders and current Board members could be taught to future Board members at a new Board member retreat instead of the four-hour philosophy meeting preceding five Board meetings.