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The Coming Leadership Exodus: Leadership Development, Succession Planning and Graceful Disengagement

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A generational passing of historic import has begun in the field of addiction treatment. The mass exodus of long-tenured leaders in public policy, private philanthropy, administration and management, clinical supervision, clinical services delivery, research and education/training has begun and will peak in the next five to seven years. This exodus raises the question of how long-tenured leaders can disengage in ways that enhance the health of multiple parties: themselves, their families, their organizations, their communities and the larger field of addiction treatment. This article offers ten suggestions on how to plan and execute such disengagement.

Time Your Exit There are two common pitfalls surrounding the timing of leadership disengagement. The first pitfall is that of premature disengagement. This occurs when a leader physically and emotionally disengages from the workplace before officially retiring, leaving his or her organization without effective leadership. A variation of this pitfall occurs when a leader leaves on short notice or is forced out precipitously without developing resources

to fill the vacuum created by his or her sudden exit.

The second pitfall occurs when a leader remains too long. There is a delicate balance in the relationship between a leader and his or her organization, the communities served by that organization, and the larger field. These relationships evolve dynamically over time and can reach a point where the creative energy that has sustained them has been exhausted. The timing of a leader's exit from an organization and field should occur **BEFORE** that creative energy is exhausted.

But how do we know when that time has arrived? Consulting with one's family, friends and trusted colleagues can help sort out such timing issues, but, in the end, each leader must assess his or her own passion and performance to identify that time of transition. Affirmative answers to the following questions are important indicators of a need to renew one's leadership role or plan one's disengagement:

- Am I increasingly bored with my professional activities, drowning in a sea of organizational details that

- have long ago lost their personal meaning to me?
- Do I feel I am no longer making a significant contribution to my organization and the field?
 - Do I feel myself emotionally disengaging from my board, my managers, my staff and outside professional responsibilities?
 - Am I spending more time as a leader looking backwards than forward?
 - Am I concerned that my diminishment of physical energy or intellectual/interpersonal functioning is hurting my organization?
 - Are there individuals inside or outside my organization who could provide better leadership than I am currently providing?

One of the most important things a leader can do is control the circumstances surrounding their own disengagement from active leadership.

Deal with Leadership Transitions

Openly Leadership transitions are best processed at all levels of the organization by visibly acknowledging that: 1) leadership transitions will be occurring in the future, 2) the organization will intentionally manage these transitions through the development and recruitment of new leaders, and that 3) this is a time for aspiring leaders to prepare themselves for future leadership roles. The goal of such communications is to assure key constituents that there will be leadership continuity within the organization. This preparatory stage involves acknowledging and celebrating leaders throughout the organization, consciously and visibly anointing emerging leaders and disentangling the persona of the tenured leader from the organization. The latter is achieved by conveying that the strength of the organization is broad-based and does not reside within a single person.

Define Leadership Transitions in Terms of Opportunity Leadership disengagement can constitute an opportunity as well as a crisis. Such transitions provide opportunities for professional advancement and organizational renewal. There may, for example, be opportunities for acquisitions or mergers that should be considered at this time. Many organizations have not considered mergers or acquisitions out of loyalty to their long-serving leader. The major obstacle to such possibilities is often the question of what to do with two CEOs. When a leader leaves an organization, it opens the door to explore mergers or acquisitions that would not otherwise be considered.

Leadership transitions are also a time to realistically assess the strengths and weaknesses of the exiting leader and what those characteristics have meant to the life of the organization. All leaders have areas of competence and interest that get imbedded into the character of the organization. Leadership transitions are times that any imbalances can be identified and considered in the selection of new leadership. It is at such times that the board can assess the internal strengths and vulnerabilities of the organization and identify those leadership assets that are most important to the future of the organization.

The greatest opportunities in the next decade will accrue to line staff, line managers and upper managers who have had little opportunity for upward mobility due to the low turnover in the managerial ranks. In the current exodus of leadership in the field, most organizations are not losing a single leader but a cadre of leaders. Replacing these leaders will create a ripple of opportunity within organizations and the larger field. It is important that younger members of the field are aware of this coming wave of opportunities and prepare themselves for greater professional responsibilities.

Develop an Exit Strategy: Permissions, Procedures and Processes to Guide the Disengagement Process

The separation of leaders from their organizations is not unlike the process of terminating a service relationship between a therapist or therapeutic team and a client. This process can be actively managed by acknowledging the future disengagement of the leader, by providing the leader permission to disengage, and by creating rituals that facilitate loosening the bonds between the leader and the organization.

These healthy permissions, procedures and processes provide an antidote to more toxic processes that sometimes accompany career disengagement. The latter include agency boards' angrily scapegoating and prematurely extruding a longtime leader, leaders precipitously disengaging, and leaders setting their replacements up for failure (e.g., withholding critical information, inciting staff antagonism toward the new leader). Leaders who do not prepare themselves emotionally for this end stage are prone to prolong the disengagement process by retiring and then returning--again and again. Where a founder/leader has long been at the center of the emotional life of the organization, an outside consultant may be helpful in planning, facilitating and evaluating the disengagement and leadership transfer process.

Create Leadership Development and Succession Plans (and Create Them Early)

The leadership development plan assures development of a cadre of leaders capable of assuming the leadership reins of the organization. Such plans outline strategies to identify aspiring leaders and to develop these leaders through further academic training, internal or external leadership development institutes and mentorship opportunities. Leadership development requires time and resources, making it important to develop and implement such plans long before key leaders leave their full-time positions. Like a number of organizations, Chestnut Health Systems (CHS) has a large core of its long-

tenured executive, managerial and clinical leaders who will retire within a rapidly approaching five-year window. To help fill this void, we utilize a 70-member leadership council (that meets quarterly for training, teambuilding and leadership development) and are developing a new supervisory training program and a leadership development institute for aspiring leaders within the organization.

Where the leadership development plan focuses on the development of new leadership, a leadership succession plan structures the process through which current leaders will disengage from the organization and transfer their responsibilities to others. This plan should be jointly developed by the CEO, his or her executive staff and the executive committee of the board. The duties of the latter are to insist on leadership development and succession planning and to monitor the implementation of these plans.

Succession planning at CHS involves two distinct scenarios. The first is a plan for the orderly transfer of responsibilities in response to the temporary incapacitation of the CEO. The second is the interim transfer of responsibilities in response to retirement or a more sustained or permanent incapacitation or death of the CEO. CHS utilizes an Executive Leadership Council as its central management structure and the ten members of this council are also charged with the responsibility of developing leadership succession plans that cover these same eventualities for their organizational units.

Develop Leaders at All Levels and in All Positions

At CHS, our initial concern with leadership development focused on the coming retirement of our core group of senior administrative and clinical leaders. As we began to address this concern, we developed a broader vision of developing leadership at all levels of the organization. Fulfilling this vision of distributed leadership is leading us to screen all new job applicants for leadership qualities, evaluate leadership as a dimension of performance evaluations, reward leadership as a desired quality in all

CHS staff and develop new internal and external staff development resources.

As we help our organizations develop and recruit the next generation of leaders, it is important to free ourselves from our own histories and to see the needs of our organizations and the field with fresh eyes. Most of the current generation of leaders entered their roles well entrenched in the culture and values of addiction treatment, but spent most of their careers acquiring the managerial and technical skills to lead their organizations. In this system, the career path was often one of counselor, supervisor, unit director, clinical director and executive director / CEO. As these organizations have grown in size and complexity and as the operating environments of these organizations have become more demanding, replicating that style of leadership preparation may not be desirable or even possible. It is likely that the next generation of top leaders will need to bring great managerial and technical skills and will need to learn the culture and values of addiction treatment as they enter and serve the field.

Solidify Your Legacy Over the course of our careers, each of us has experienced hope that we might leave some lasting legacy to our organization and the larger field. As the end of our careers approaches, it is a good time to review the nature of that legacy and focus on bringing to fruition our final contributions. For some, that legacy will be a stable, financially solvent, high quality service organization. For others, it will be a well-trained clinical team, the organization of some new service initiative, procurement of funds for a special project, the mentoring of one's replacement or passing along one's knowledge in some durable form (e.g., a book or training video). Reflections on one's legacy can help focus the leader's final years and months and fill this time with renewed energy and meaning. Such reflections can identify precisely how we can best use our remaining time in our organization.

Generating renewed purpose at the end of a career can help solidify one's overall

career satisfaction and enhance the sense of "leaving while on top." Many of today's aging leaders entered their careers during the frontier days of transitioning addiction treatment from a social movement to a legitimate professional field. Some will find great satisfaction in moving back to the frontier boundaries of the field during the last stage of their career, e.g., looking for new areas of service innovation or broader business opportunities that will help maintain the organization's core mission. The goal is to find a zone of activity in which one can be as energized at the end of one's career as one was at the beginning of that career.

Pass It On (It's Time for Focused Mentoring) The accomplishments that have marked our careers have been more than a product of our own intelligence, skill and effort. Luck of circumstance and the guidance of others contributed to these achievements. Particularly important were individuals who believed in us, mentored us and opened doors of opportunity for us along the way. One way of expressing our gratitude for such assistance is to pass that encouragement and opportunity on to the next generation of leaders in addiction treatment. Courtenay Baylor, a lay alcoholism psychotherapist at the Emmanuel Clinic in Boston in 1913, initiated the tradition of intergenerational mentoring among the lay psychotherapists (the first paid addiction counselors). Baylor taught other lay therapists that their helping careers were not complete until they had recruited and training their replacements. This master-apprentice tradition is still worthy of emulation.

We recommend that departing leaders increase the time they spend teaching, mentoring, modeling core organizational values and conveying the oral history of the organization and the larger field to the coming generations of addiction professionals. Each of us must ask ourselves what distinguishes addiction treatment from all other arenas of health and human service, and try to convey this historical essence to those who have no memories of a world without specialized

addiction treatment. We need to help the leaders coming behind us separate those issues that can be decided by expedience and consensus from those that must be decided by conviction. We have much to pass on, but those core values, core ideas, core service technologies and core management strategies may be our most important legacy.

Arrange a Proper Goodbye Most leaders and their boards have invested considerable time in financial preparations for the leader's retirement, but have invested much less time in preparing for the emotional processes involved in such transitions. Many leaders are uncomfortable with the emotional aspects of disengagement and sometimes prefer to avoid the discomfort of rituals like the retirement party. Leaders need to recognize that such rituals have as much to do with the health of the organization than with honoring their contributions. It is the exiting leader's responsibility to participate in rituals that facilitate leadership transition—a symbolic passing of the torch. These rituals serve numerous functions, from providing a venue in which everyone can expiate ambivalence about the leader's exit to providing a framework through which the leader can make necessary amends and express gratitude to key members of the organization and the community. Most importantly, this is a ritual to celebrate the accomplishments and continuity of the organization.

Get Out of the Way (Find New Pathways of Service) It is a rare leader who is not tempted to re-engage with the organization (via contact with staff and board members) following their exit. One must avoid the temptation to sabotage new leadership and to avoid being pulled into this role by others. One must avoid the tendency to become a ghost that continues to haunt the organization through hidden communications. Laying the foundation for the success of one's replacement and supporting the new leader is the final assertion of one's organizational commitment and professional competence.

The final act of leadership is to get out of the way.

Every generation of leaders perceives their generation as special and approaches the end of their careers with trepidations about how the field will fare without them. But the historical truth is that new leaders will emerge from predictable and unlikely places and the work will go on. We must trust the momentum of such history and the efforts we have expended to nurture future leaders. It is time we stepped out of the limelight of leadership and found less visible but perhaps equally fulfilling ways to continue to serve our communities and our chosen field.

The future of the field of addiction treatment hinges on how well we perform this job of leadership development and transitioning. We have contributed and endured. The time is rapidly approaching for us to assume our rightful place as elders of this most unusual profession.

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