



Next in Line

Conservationist Conversations on Succession Planning

WHY, HOW, AND WHAT'S NEXT

NOVEMBER 2024

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It is such a complicated issue, so nuanced and so individualised.

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I'm stepping down at this time because it's what's best for me, and by acknowledging and accepting my limitations, I believe that I am ultimately ensuring the sustainability and success of the organisation in the long run.

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The primary reason is that it is a community conservation project. So, it should be owned by the community, and being owned means it needs to be run by local community members.

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I don't want to be an arm-chair conservationist. I wanted my skills to be used and be useful in other, different work.

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It is a lot of hard work for me to let go.

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I had no models or ideas to follow. I was panicking.

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So much of our self-worth and identity is tied up in our organisations, and no one – no one – will understand or appreciate the sacrifices you've made to build the organisation to where it is and how hard you've worked.

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I think there's also a time when a project needs fresh blood and fresh ideas.

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I really think how you onboard someone is so important and taking the time. If I were to do that all over again, I would say, I'm committing at least six to eight months of one-on-one time with you. You don't do anything else, but you just sit next to me and we just do it together. We work together as a team. You learn from the example.



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Introduction

THE REASON FOR THIS DOCUMENT?

“I was recently asked why I included a session on succession planning in a workshop focused on community-led conservation. In that moment, I realised the connection isn’t as obvious to everyone as it is to me. One of the only real solutions to the biodiversity crisis, in my view, is having communities lead conservation efforts. They know what’s best for their land and wildlife—this is the essence of true community-led conservation.

Over time, I discovered that a significant barrier to community-led conservation is the lack of succession planning within conservation projects. Too often, a single person leads the project until they are elderly, which creates challenges for sustainability. I’ve frequently spoken out against this ‘one-face’ model (organisations built on one highly visible leader), as it limits the effectiveness of conservation efforts. Conservation should be a team effort, driven and owned by the communities themselves.

From the beginning, I have wanted to ensure the organisation I founded is truly community-led into the future, but the challenge has been figuring out how to fully transition to this model I believe so much in. In conversations with friends and peers, I discovered that many of them were facing similar crossroads. Some were navigating transitions within their projects, while others were considering stepping back entirely. Clearly, this is a topic that needs more insights.

To explore these themes, I reached out to 13 exceptional conservationists and leaders to gather their insights and experiences. Their responses were incredibly inspiring and thought-provoking. This document is a collection of their wisdom, offering valuable perspectives on succession planning in conservation. I believe this is just the beginning—the conversation about succession in conservation needs to continue.”

Shivani Bhalla, Ewaso Lions.

WHAT IS SUCCESSION PLANNING?

At its simplest, succession planning is the process of identifying and developing new leaders to succeed current leaders.

Within the corporate world, succession planning is a distinct and formalised process. Most Boards, particularly in highly regulated industries, require a succession plan for the key executives and successors are identified, nurtured, and prepared for the next step over a significant period of time. Moreover, the executives who are to be succeeded have no expectations that they will remain with the organisation for an indeterminate period of time.

In the context of wildlife conservation, succession planning refers to the strategy of ensuring that leadership roles, expertise, and conservation efforts are sustained over time by preparing for transitions. It focuses on maintaining continuity in projects, policies, and organisational goals, especially when key staff members, managers, or researchers leave, retire, or transition to new roles. Succession of the Founder, however, has not been a commonly discussed phenomenon as Founders typically remain at the helm of their organisations for an undefined period of time.

In recent times, however, there has been a shift, with Founders and Executive Directors exploring succession planning, initiating these conversations with stakeholders, and contemplating who comes next. Upon realising that there is no one answer to the question of succession planning, this document is intended to start a conversation amongst conservationists by compiling a series of interviews with Founders and Executive Directors who are in the process of transitioning from their roles, and to serve as a launching pad to come together, to crowdsource ideas, and to share insights and experiences.



I am not tired or wanting to do anything different. For me it is the right thing to do.

Why Succession Planning Now



Succession is about letting the light in. It has been such a privilege to live and breathe work that is so meaningful and live in this beautiful place. We honour and pay back this extraordinary privilege by opening opportunities for new ideas, energy, new people to carry on the work. If we don't let the light and air in, it won't grow.

The connotation of 'leaving' is that it is for negative reasons; that is not always the case. Interviews with the conservationists revealed that while there are a multitude of reasons behind the desire to transition, their love for their organisations, for the work they do, and more broadly, for conservation, is immutable.

THE PASSION

"Every single time I see lions, I feel like it is my first time. And this is more the case when we see lions outside protected areas – lions that live alongside communities. They are not only surviving but thriving in these areas. I feel like it is such a privilege to do what I do every single day and to see the impact our work has had on the lions, our communities and especially our team."

"Co-founding the [organisation] and leading it for the last 17 years has been the most rewarding work I could have dreamed of doing...working with the pastoralist communities who share the landscape with Grevy's zebra has been my greatest privilege; I have learned so much from them, and they have shaped who I am today and how I see and approach community conservation."

"...it is quite a privilege to run [the organisation] and seeing the results of the hard work bear fruit, especially the positive change in behaviour of the people living in the neighbouring villages."

"My deep love for conservation and my commitment to its transformative power in improving livelihoods and addressing climate impacts are as strong as ever."

THE TEAM

“I have loved seeing the team grow in to the exceptional leaders they are today and how they have truly owned the project – it has become theirs and this is a truly community owned and led project. This gives me more happiness than I could ever have imagined.”

“One really pleasing aspect of this work is building the team of people, and seeing their capabilities develop. The majority of our staff have worked for us for more than 10 years now, which I think is testament to the environment we have created that encourages and supports personal growth.”

“As I complete our leadership transition, it gives me immense joy to see my successor thriving in his new role and to know that our team has exceptional ownership of the mission. I feel excited and confident about [the organisation’s] future under his leadership and our outstanding team.”

THE FUTURE

“Stepping down from a leadership role does not mean I have stopped loving conservation; it simply means I have found a new space and a new way to channel my passion. This transition enables me to deepen my involvement in conservation while creating room for fresh leadership to expand on my work and drive growth in the organisation. I view this phase in my life as an opportunity to leverage my experience and extensive network to drive impactful initiatives and make a more significant contribution to conservation efforts.”

“Although I have stepped down / transitioned from my role as Director, my passion for conservation has only deepened. With more mental space, I can now dive into the technical aspects of conservation that not only maximise impact but also resonate with my experiences and interests. I feel empowered to contribute more effectively in policy, science, and management spaces, allowing me to engage in meaningful collaborations that drive positive change.”

For some conservationists, there was a single reason for deciding to leave; for others the reasons were layered and multi-faceted. The most articulated reasons were the desire to not languish and to remain in the organisation beyond their usefulness, as well as the wish to provide opportunities for others, whether it be the next generation or members of the local community in which the organisation operates. Well-being and the need to be mindful of one’s health was a frequently cited reason, perhaps reflective of the global trend that started during the pandemic of recognising the whole person that comes to work and that stress and burnout can manifest physically and have negative impacts on one’s physical health. Additionally, challenges of living “in the bush” often led to health issues. Some interviewees had an exit plan from the start, others discovered a change in priorities through life changes. Lastly, some conservationists cited the notion that “it was the right thing to do”, a desire to re-engage with the passion that led them down the conservation path in the first place, and the existential threat of suddenly not being part of the organisation, as reasons for embarking upon the soul-searching journey of considering their departure.

Most conservationists will empathise with these reasons and many of the interview excerpts below will resonate with those who are starting to think about their next steps.

“I DIDN’T WANT TO BE STUCK”

“It was lingering for a number of years. I wanted to move but didn’t know how to do this. I didn’t want to be stuck at my organisation”.

“I don’t want to keep carrying on and eventually be forced to leave because I am too old to do the work properly”.

“I start[ed] feeling that I was becoming less patient about things and more cynical about what I thought would not work well. I start[ed] feeling that I could no longer be positive about new ideas as I was [so] sure [of] what could go right and what could not go... and the feeling that I was no longer the right person for their future not did go away.”

“I have carried my husband’s dream for him throughout this time. I don’t want to do that anymore. I have done serious therapy and alternative development work, and we African women feel we need to always be there to help, a sort of “mama-syndrome”. It is good to be altruistic, but I have learned that that also eludes and hides serious issues with oneself. I have to stop doing that, because it is running away from oneself.”

“I didn’t even know I could leave my current role and get out of the humdrum. I just thought I was trapped here for life. I’m bored and tired. I’ve been doing this for 15 years.”

“I kind of feel we’ve got to the point where we’ve developed conservation tools that work. I don’t want to do them, and I don’t want to write the tools around them and the reports that go with them. They should just work now, and someone else can do that. It just suddenly occurred to me that maybe I might be more useful doing something else.”

“I just felt I put all my hot blood, sweat, and tears into this project and worked stupid hours, I mean, really gave my pound of flesh. And then felt that to not lose that I had to keep going. I am really bored of the humdrum. I am so sick of report writing and staff management, and dealing with niggles and gripes and my Boards, and the endless fundraising.”

A DESIRE TO GIVE OTHERS

THE OPPORTUNITY

“I wanted to give younger people opportunities to step up and do what I used to do. They would have much more opportunities. I didn’t want the organisation to be stuck with me in the same approach.”

“Part of it is also that I really recognise that to be successful with the organisation is about making it sustainable. And not only in the case that I get hit by the proverbial bus one day. We all transition at some point for one reason or another, and so to be successful, it’s really about having that vision continually there.”

“They needed someone new with more energy and a different view, so the organisation could also grow.”

“I was ready to transition from my position primarily because I felt I had done everything I could. The organisation was in good shape, and it was time for someone else to come in and build on what I had done. I am grateful for the experiences and opportunities I have had over the last ten years, but I am also looking forward to new challenges and growth. Stepping outside of my comfort zone will allow me to continue growing personally and professionally.”

“I am good at what I do. I am very good but I don’t want to do that anymore. I have to create the space for others to do it. Find people to do this work who are really committed.”

“I think there’s also a time when a project needs fresh blood and fresh ideas. I don’t feel fresh anymore. I feel like that cabbage at the back of the fridge, slightly growing mould. So you know, fresh is good. And I would hope that the project would only get stronger by me exiting.”

“I wanted someone on the ground. It’s also about the role - I wanted someone to oversee the day-to-day running of the organisation.”

“More importantly, I wanted to hand over to the next generation.”

WELLNESS AND

WELL-BEING

“I am also stepping back because of my health. The stress of running an organisation and everything else that comes with it weighed on me, and I burned out. Being a leader is not as glamorous as people think, especially for a small non-governmental organisation that is entirely reliant on donor funding. People may perceive this as a weakness, but I am recognising what is best for me and, ultimately, the organisation.”

“Overall, I find that what is really important as leaders of our organisation, whatever role that is, we have to be driven by passion and it’s a bit of a roller coaster and a yo-yo and if it goes down too much, we can’t do our jobs. My job is to inspire, to have that vision and to keep motivation high and to keep the passion going of what we are trying to accomplish. But if I am dealing day to day or with HR etc... you get so frustrated and you are banging yourself on your head. It was self-preservation in the long term. I was trying to isolate myself. So I would remain in a more positive and neutral position. I gave my life to not just the organisation, but to also my team – to the people – at a personal level. You get so sucked in. It pulls you away from the vision of your organisation and it derails you a little bit.”

“I’d been thinking about this for a while. I think there were a couple of moments or triggers. One was my health was not so good for quite a long time, and it was the daily stresses and challenges we were facing and challenges I was facing as an Executive Director that also made my health worse. My well-being was not great. I was so overworked doing a whole bunch of things that I also didn’t enjoy, so much. I actually really just want to go back to the wildlife and have the time to focus on my health and just move away from some of that day-to-day stress.”

IT WAS ALWAYS PART

OF THE PLAN

“It has really been a 10-year plan that I’ve worked on. Even when I was hiring my successor, I hired him in the context of whether he could be the right leader to take the organisation to the next level. So, it’s been on my radar for a long time. Personally, I’m a builder. I like to build things. I like to start things. The ongoing management and maintenance is not as interesting to me.”

“When I set up the official/legal structure, I started to think of leaving already because I had already been working on it for 5 years whilst it was still a project. I had worked with the team and I needed to have a formal organisation which was sustainable. I stayed for 2 years as a Director and was leading the organisation. Then I was part-time and subsequently I moved on to a different job. I had noticed someone who had the potential to take over. I made the most of that and realised this was the time to leave. I wanted to leave it with someone who could continue, create programmes, and I can help with ideas and fundraising.”

“It has almost been from -not exactly day one. It has been a conscious process and decision for me to build capacity in terms of the staff. I’m technically an ex-pat. I’m not a citizen. I’m a resident. All the other 67 staff are all local and that’s been a deliberate strategy to build that capacity and have local people to run the organisation. And certainly run the day-to-day operations.”

“IT’S THE RIGHT THING TO DO”

“I am not tired or wanting to do anything different. For me it is the right thing to do. It is a foundational reason for stepping back and it has been our aspiration from the beginning. We want it to be 100% local and being led and driven by local people. This is not easy for us to do as it will break our hearts, but it is the right thing.”

“It was actually when I won an award, that I saw that the local people did not feel that I represented the island or the local people, even if in my heart I was doing it all for all of them. They felt that the award was for me and not for the organisation. I realised then that this could damage the organisation. And the government did not see us as a local NGO because I was the person in charge, and they see it was a white person’s organisation. But we are a local organisation with 64 local people. But, from day one I always feel that the leaders to do conservation on the island needed to be local. That, the local people were the best ones to protect their island. And, of course, the position of Director could not be different.”

“It was very intentional. I think it’s been deliberate for a long time. The primary reason is that it is a community conservation project. So, it should be owned by the community, and being owned means it needs to be run by local community members. For both Founders, it has always been intentional.”

NEW / OTHER PRIORITIES

“It started when I had my first child. I realised that I just can’t be there for the organisation all the time. I have another priority in my life now. I thought how am I going to give the organisation what it needs and as well as my kids. That is what got me thinking about it. I realised when you give everything to your organisation and your family, it can be really hard on your well-being. I knew I couldn’t carry this on forever.”

“I love writing. I don’t want to use the project and the organisation as an excuse not to write. Writing is a very engaging and demanding endeavour.”

GETTING BACK TO YOUR PASSION

“There’s some of the day-to-day stuff that I don’t like doing so much. And I felt as the project and organisation grew, it was taking me away from what I really loved. And what I really loved is being out with the wildlife. And when I was doing so much of this day to day, it would require so much time on computers and it would exhaust me so much.”

“And that was compounded by my health. I had no time and no energy to even go out to look for wildlife. And I know for sure whenever I’m out with wildlife and driving around, I’m the happiest. And whilst I’m still physically able to drive and look for wildlife, I want to have the time to do that. And so that was one of the reasons I wanted to really think about stepping back from this role and doing some of the things that I really, really enjoy. And go back to the wildlife.”

“I want to divorce my computer. I am so done. I don’t want my job to be at a computer all the time. And if that’s my job, that’s not what I set out to do. I will end up leaving and I don’t want to leave. And I don’t think that’s the best for the organisation. I need to spend the time with the species. I need to be inspired. I need to be motivated so that I can do my job. And I recognised that my needs weren’t being met for that.”

EXISTENTIAL QUESTION

“And there’s a few moments I had, I think over the last, I can’t remember how many years, what if something happens to me, I don’t want the whole project to collapse. Like, you know, what’s the next step, what’s going to happen?”

How Might I Approach Succession Planning?



I wish I had known – this has to be a priority – I may have approached things differently. I would have been more intentional off the bat so I would have created the support I would have needed and not all by myself.

STRATEGY

A critical part of succession planning is aligning the process of succession planning to the organisation's strategy.

According to the Bridgespan Group, “Strategy is all about getting critical resource decisions right. Strategic planning is therefore about deciding how best to use a non-profit’s limited resources to achieve its goals.”

The Succession Planning journey needs to start with an understanding of where the organisation is going strategically and understanding the vision that emanates from the Founder / the Board and that is shared across the organisation.

Oftentimes, organisations that come into existence less formally and in an ad hoc manner need to create or update the strategy in order to prepare the organisation for the transition, as one interviewee indicated, *“I looked back at our strategy and realised that we needed to update our strategy. I started working with the whole team together. We discussed our strategy for the next 5 years. Everyone worked on the strategic plan for the organisation and things became much clearer”*. Having the team involved in contributing to the strategic vision of the organisation is important for continued commitment to and work towards the goals and objectives of the organisation, as explained by one Executive Director, *“[We] retrieved what the team sees the organisation in terms of the value and culture. They came up with a shared view of how they want the organisation to run in the future... Once the process was finalised, we looked in to somebody who can lead in a way the team wants the organisation to run.”*

WHAT ARE THE OPTIONS?

One Executive Director? Two Executive Directors? A Senior Leadership Team? A hybrid approach where there is not a complete transition to a new Executive Director?

There are several options to consider and will depend on the organisation's strategy. Some of these excerpts from the interviews reveal the types of questions and issues that must be considered during this journey.

A SINGLE SUCCESSOR

"Ultimately you've got to have accountability in an organisation, and there has to be one person who is ultimately responsible for the success or failure of the organisation. Identify a candidate, look at the skill set, and where we saw gaps, and then how we would fill that in by giving expanded responsibilities in certain areas...I think this transition has been more evolutionary than revolutionary. And I think it's worked well."

"I am handing over to one colleague. What he does have (being local, knowing the organisation, the island, the communities, the love, the personality), that you do not learn in any place... you cannot find that in anyone else from outside. He knows the communities, the islands and the team. He is also very diplomatic and a great mediator and so well respected. I knew that with proper support, he could do it."

"I plan to hand-over to one Executive Director (ED), as that is how the organisation is set up. It is a two-pronged approach: hire an ED while also developing capacity in other managers so they can make decisions without always referring back to the ED. I want to empower the Senior Leadership Team so that they can make decisions independently to improve efficiency and ensure a smooth transition when the new ED takes over."

"We had someone who joined us as a project manager whilst I was the Executive Director. My first step and the main thing I did was send her to lots of meetings to represent the organisation. When she brought back reports and discussions, I saw that she can be someone to lead the organisation. I saw that within a year. I started to prepare the organogram with the presence of that person



It's a team effort that is going to make the change. And it's not one or two individuals.

and knew she could take my position. I helped develop her leadership and skills of directing, leaving people to make decisions, as this is what we wanted. I was so attracted to that and this was my time to go. I spoke with her and asked her how she felt about taking the lead. I then stepped back and she stayed for 2 years. I had a lot of connection with her and kept the relationship with donors. I wanted to keep the trust with donors."

"I brought on an Executive Director; one of the things that I did right away was ensure we were on the phone every day. And then instead of telling him how to do it, I was having him ask the questions, but I was sitting next to him then, then saying, okay, why are you doing that? How does that help you reach your overarching goals? Tell me how that contributes to the mission. I gave him the freedom to make decisions a little bit, but then working through how it would work by questioning him. The great thing about this is that he is not defensive and he's very open-minded and wants to learn. And so in terms of projects, every time he made a decision, it was talking through that project and always going back to what's our mission? What's our mission like? Is it moving the needle for conservation?"

"One of the senior researchers wanted to become the new Executive Director (ED) which the team accepted and I handed over my responsibilities to her legally. Since then I engaged the team a lot in order to support the new ED to settle down. After a year, she is much better at handling all by herself. But I am also now on the Board after I was invited to join. And the team easily communicate with me."

A TEAM APPROACH

“When we were starting to think about succession, we created the Senior Leadership Team and that really changed everything and it spread the responsibility across 5 of us. It felt like a team and didn’t depend on one person. I didn’t want it to be one leader focused - I wanted it to be team focused. So no matter what happens with one leader, other leaders could hold the space... That structure set a new culture.”

“Currently we have 3 Co-Directors – all roles are independent of each other. Roles are: Managing Director, Operations Director, and Conservation Director. We don’t have a hierarchy structure and it is an approach that works well for us. We have the same salaries and the same powers. Currently we have diversity and different strengths between us all at this high level. We are very strategic between the 3 of us how things work. We currently have 7 managers - 3 women and 4 men. Out of the 7, 2 of them will become Directors. The same approach will continue. One of our key philosophies is that we will not hire externally. We lift our own people up and our top levels will be people who have moved up over time. They come in at level 1 and move up. That is how the team is filled.”

“When we started, we had many meetings with the team, and we talked about it, what it would look like, and what would work for them. They wanted some of the handover, but not all at the beginning, and in the end, it was about all of us coming up with a plan together and moving through it. It has taken years and many iterations. We had external facilitators. We did some internally. Then, we created an institutional arrangement that could hold how we would operate and make these changes. A flattish structure was necessary within the team when it became apparent that no one or two people would fill a primary leadership role. It was the whole leadership team who would take those roles. And that is where we are now.”

“We have nine people on the Senior Management team. They make joint decisions. Seven of them are the primary budget holders. We also have three committees within that --one committee runs the conservation metrics, where we look at the conservation impact of our work and ensure it’s hitting the targets and that the metrics are hitting the density numbers. There’s the

operational committee. And that one ensures all vehicles and camps are functioning and that we are compliant. The organisational committee is where our HR and other people-related things sit. The executive committee comprises one member of the three committees, who work more closely with the Directors. The Directors are not heavily involved, with the leadership team reporting to each other. The Directors weigh in on the final budget. And if there are any significant issues, they can come to us, as we’re there to support them, but they make all the decisions.”

“I have been working on my job description. I spent a few months writing out my role. And it took me a really long time because I didn’t just write a title. I wrote a whole paragraph of what it means. Say for example, I wrote “corresponding with donors”, I wrote a whole paragraph on what that means. It was a really long process. It’s taken me about six months and it’s 12 or 13 pages long. And what it helped me do is realise maybe this is not just a one person job. It actually is a two-person job. In fact, some of it shouldn’t even be my job. I’m quite open to a Co-Director position; one person might be good at some of the things; another might be really good at another whole bunch of things. Because I’m really aware that whoever takes over is not going to be like me. So maybe a Co-Director position could work. So that’s currently where I’m at. I’m open to whatever might work.”



I think it is very important that the Founder provides his/her successor with ample room to bring in new ideas.

A HYBRID OPTION?

“I am starting to think about a multi-layered handover. And because I don’t know what to do next, and I obviously need an income, I decided I would like to move into a Director role as a proper Director - to steer the ship if necessary, but mostly just watch and nudge. I can then be more involved in the stuff that actually interests me. And so my thoughts are of handing over the operations and that I work to do conservation planning and grow capacity outside of the country. So, my plan is to do that for a couple of years, while I figure out the rest and what my next big thing is. So initially I would transition within the actual project itself as that guarantees me a salary. I’m not brave enough to try and set up some sort of freelance. And then I would have 3 people doing the day-to-day. We have 6 pillars within this project, and so we would have one person responsible for 2 pillars, etc. This is all very clear within our aims, and how we structured everything. Then I only have to oversee the top 3, and the rest is theirs to deal with. We have a clear strategic plan, so as long as they stick to the plan – and add - where the fresh blood comes in with new ideas and new insights and new contacts and things.”

“I’m not directly involved in the day-to-day. I’m at an arm’s length at least away from day-to-day operations, and but I still do get involved. I may give specific instructions to certain things as and when required. I largely leave it to the operations manager. We’ve now also recruited another person to take some of the load off him - some of the administrative and HR issues. This means he can be a bit more hands on with the field operations. I may transition within and I don’t have any intention at this juncture of stepping away completely. One of my main concerns is fundraising and the management of the funds. This makes me nervous and wary about the future. Most of my time now is dealt really with fundraising and donor development. I have an eye on daily operations, but certainly, the mundane stuff, I’m not involved with.”

THE IMPORTANCE OF TRANSLATING YOUR VISION

Regardless of the path that is ultimately chosen, it is critical that in addition to aligning the succession plan with the organisational strategy, the Founder or Executive Director’s vision is clear, explicit, and well communicated. As one interviewee so aptly expressed it:

“I want to keep a close-knit team that is very passionate about what we do. And I think that ultimately is what drives us forward. And I didn’t want to lose that...”

The new people are basically representing you in a way. You want things to be done in the way you expect, but to do that, you have to really onboard them so that they understand otherwise they’re going to do it in the way that they think it should be done or the way they want to have it run. I try and have events where the whole team is involved. I don’t care what role you are, you could put on a pair of running shoes and go out into the field and help build a road. I really think it’s important to keep everyone connected in a way.

I really think how you onboard them is so important and taking the time. I would say, I’m committing at least six to eight months of one-on-one time with you. You don’t do anything else, but you just sit next to me and we just do it together. We work together as a team. You learn from the example.”



I struggled for a few years about how to do the transition smoothly. I worried if I don’t do a good job transitioning, I wouldn’t know the organisation’s future fate. I had to be very careful.



Post Transition



I am the organisation. The organisation is me. It is my identity, and it is who I am. I don't separate them, and I incorporate them all together. We are all part of it together.

Given how much time we spend in our vocation, when anyone leaves an organisation, there are always feelings of loss – of daily routine, of identity, of purpose. There are, however, options that exist and multiple paths to tread.

I DEFINITELY NEED TO LEAVE

“I am a control freak and I know that. It is a lot of hard work for me to let go. It is unfair to whoever comes after me. It is unfair for me to stay on the Board. I would interfere and create a parallel power. If the organisation is to continue and to grow, it has to have 1 leader. I want to quit totally.”

STEPPING STONES

“One of our big goals with Smith was to formalise everything. I told our team I was taking a different role and was stepping aside so everything had to go via Smith. His track record was 2 years in other places and I knew it would be short term with him. I saw it as a good opportunity to remove myself. It was really hard for everybody. It gave me an out to step away. John transitioned in after Smith left. We got to the 3.5 year mark. John came up as more of the leader of the organisation and stepped up in that role.” (Names have been changed to protect anonymity).

“Following discussions with the Board, I will remain as a contractor or advisor to assist with the transition and provide whatever assistance I can to the new Executive Director (ED) to ensure that we do not lose donor trust and confidence. Some relationships cannot be quickly transferred during the transition. Maintaining continuity in communication with key stakeholders will be crucial during the transition period. I will be available for the first few months as the new ED establishes his/ her own working culture; however, I do not want to hover in the background, and the team must establish a relationship with the new ED.”

MY LINK...IS NOT CUT

"[I] also feel some happiness and relief because although I left the executive team, I remained a Founder and am on the Board of Directors to support strategic directions and fundraising, so my link... is not cut, it becomes even stronger as I decided to represent my organisation as a Board member would do."

"I am looking at longevity. I don't want to step away. I have no intentions of walking away in 5 years or 10 years. I cannot imagine having this not part of my life in some capacity. I am just trying to find ways to make sure I can do that."

"When I was invited on the Board, I was pleased that they still need my help. They still want me to be involved. And the team wanted me to be there. The new Executive Director said to me that if I was on the Board, it was security for them."

"I will work part-time initially and be a Strategic Advisor for 2.5 days a week. We are hosting a big conference which I want to support. It's a paid position as a consultant. That way I can be very clear on my boundaries."

"I am on the Board of Directors. My role is advising the development of programmes. We are 5 within the Board and each of us have specific roles within the Board. Each of us is accountable within the Board and we speak up if something is wrong related to that role. Its pro bono."

"I don't think I will ever leave. Maybe I transition to the Board or something like that someday. I want some level of involvement."

"I feel like we're already in the role of advisors as Directors. We provide support and act as advisors. I always want to be there to support the project if needed. And so far, the team has said they always want us to be part of it. So, we're still all very much family."

I DON'T KNOW

"I don't know what my future role would be. It is emerging that we may still end up doing some things after 2028. For example things like using our influence or fundraising. These are not necessarily things I want to do but I may need to do them. I

am hopeful that the universe will provide for us and opportunities would present themselves for what I can do to remain in the bush. All this is very hard because it is about both the practicality of work and the project, and our love of the place."

"I offered to stay in an advisory role for a couple of months...but it was not fair for the new Director to still have me there, in the shadows and the organisation was pretty much my face and my heart. And it was not healthy for me as well, to still linger around the organisation that I led for so many years. I was very proud to feel that the new Executive Director (ED) contacted me less and less, meaning that he did not need me anymore. Only with me out of the picture, he can find himself in the leadership position and have the freedom to be the ED he can be – different from me and not only a replacement. I am very happy that I could move on – something I was afraid I could not do – and that they continued to thrive without me."

"I'm a conservation planning specialist group facilitator, and I really enjoy the conservation planning. So as part of my current plan, I would like to do more of that. The other thing is I am scared to cut a salary. Currently, I have a fairly guaranteed salary for as long as I wanted. So once I hand over and I'm in a Director role –I would want to be paid a retainer."

"I definitely want to stay involved. I think I will still stay on as perhaps an advisor or go into part-time. Eventually, I would like to transition to become a Board member. But the point is that I still have a lot to offer. I still have so much passion for this project, so use me. Use what I've got - let me still be part of it. And knowing that I have to be very, very careful not to annoy the new Executive Director (or Co-Directors) and not to step on anyone's toes. That is going to take a lot of work. And that's why I'm starting now because I want to get used to that. I am at this point where it would be something I would feel so sad to give up. But if that's going to jeopardise the project, then maybe I would. So, I don't know at this point what I would do about that. The other thing is the donor side of things - a lot of the donors have become really good personal friends of mine. And it's really hard to just let that go? So, I think there will still be some sort of donor connection with me. Possibly the long-term donors who've been really close and really good friends of ours, I'll continue engaging with them."

What Are The Potential Pitfalls?

INDIVIDUAL

"I realised I hadn't thought about myself. What I know was I wanted to continue working in the conservation field."

Don't think only about the organisation and its future – think about yourself too.

"The person leaving needs a coach. And the person taking over also needs a coach. Perhaps consider a joint coaching session?"

Consider external support via coaching.

"Emotional drain has been the pitfall. You need to be intentional about self-care during this process."

Consider a sabbatical for personal restoration.

"I worked with a coach last year for a while...She gave me a lot of tips that I've actually implemented and I think they're really useful for someone like me. She said, 'well, you've got to be really intentional about it. You've got to not just keep talking about it forever, but actually set a date.'"

Be intentional: set a date and work towards it.

"What is my value now that I am no longer the leader? It's definitely one of the barriers to succession. I think the core issue is around valuing ourselves professionally beyond our organisation."

Recognise that you are not worthless outside of your organisation; in reality, you have value and so much to offer.

ORGANISATION

"The number one thing is to ensure that you have a clearly articulated and shared vision of the future of the organisation."

"[Do you have] shared values in terms of how you see the world, how you treat people, what the organisation should look like, how you treat your constituents."

"It's important to be able to give yourself an honest assessment... in terms of what are your strengths and contributions to the organisation, so you don't take those for granted and then making sure that those specific skills are addressed. It doesn't have to necessarily be just in one person, but certainly in the team."

"You shouldn't rely on only one person when you do the leadership transition. Look at a couple of people who can lead the organisation instead of looking at just one. I should have put in place a co-directorship."

"...accepting and embracing the existing culture and values of the organisation (if they are healthy) that have been at the heart of an organisation's success."

"...having conversations around power and privilege, and critical issues of unconscious (and in some cases conscious) bias are extremely important."

Think carefully about the future of the organisation, its values, and required skill sets.

TEAM

“We need to make sure the team know that we aren’t abandoning them and this is not about us being tired or bored. We just know it is the right thing to do and we want the team to know that.”

“I brought the change, but I didn’t do enough to bring the whole team to really embrace the change that I am leaving.”

Recognise the impact on the team and take steps to reassure them and allay their fears.

“Having a flat structure is good for us. However, a pitfall can be that sometimes, our team doesn’t want to discipline each other. They’re very kind to each other. We must be mindful that conflict or crucial conversations can be difficult, especially for close-knit teams with a flat structure.”

Take the time to work with each team member to build their skills and confidence. Choose your team wisely to ensure strong teamwork and good retention.

HANDOVER

“I am still working as a Director and I want time to do a handover but it has been very hard to find the time. It has been very challenging to do my work plus the handover.”

“Focus on a few key tasks and do them well rather than trying to do everything.”

Structure your time well and build in additional time as it may take longer to transition than you expect.

“I wish there had been some sort of plan of any sort. I really had to start from scratch.”

“You have to just trust that they’re making the best decisions for the organisation. That’s also really important for their respect.”

“We have to make sure what we’re handing over isn’t the same beast because we may set the new leader up for failure, and we also don’t want them to end up with the same well-being issues.”

For the incoming person, ensure that you have clear standard operating practices, well defined structures, and transparency. Give them the tools and the authority, and then respect their decision making.

DONORS

“Our biggest single donor has been quite explicit in telling me that I can’t step away...He’s a very big donor and he’s pledged a serious amount of money. He said “you can’t step away”.

“The current donor model isn’t one that supports succession. The donors that will understand succession and where succession will really work are the donors who develop individual relationships with us. They connect with our team and then they get the vision. Authentic conversations are needed for this. The donors get to know us and who we are and that there is an authentic story there that is messy and complex and not just good news stories. The real goal for succession and for fundraising - which is the hardest thing I am worried about - is to develop the relationships with donors like that. Donors who are very connected to us and our teams. Superficial level engagement with donors will not help our teams at all. It is the deep engagement we have with long-term donors is what will help with succession.”

Take the time to engage with donors and reassure them of the continued stability and sustainability of the organisation post-transition.



Timelines

Between making the decision to step back/leave and actually stepping back, how much time did you give yourself?

“The whole process took me five years.”

“Two Years”

“I think before you even start something, you should have your exit strategy in mind.”

“I spoke to the Board one and a half years before.”

“We have always had this decision - it has been there from the beginning that one day we would leave.”

“Five years”

“When I renewed my two year contract the last time, I knew it might be the last time I did so, and at the start of 2023, I told myself that I was doing this and would be transitioning.”

“I’m giving myself a five year deadline.”

“Seven years”

“It was three years total to think about leaving.”

“I would like to think two years. To make sure everything is running, but pull myself out of the day-to-day running.”

“I started looking for an Executive Director and he started two months later. It all happened within three-four months.”

“We set a minimum of five years. It has been between five and 10 years, although we started talking about it 20 years ago.”



And then all of a sudden, it became so clear to me. That sense of clarity that you sometimes get in your heart, not your brain. Then I put a date. Period. And that’s it. I’m done.

Structure



Culture changes within an organisation but you can still have the core elements of it which don't change. We spend time talking about trust.

What does the structure look like, and specifically, what are the governing and decision-making structures (including the process for navigating challenges and disagreements)?

"The strategic plan was the base for the main activities and to ensure they run smoothly. The new Executive Director follows the existing strategy. In terms of the decision making, it is ruled by the Chairman of the Board."

"Nothing will change structure wise as we have the Senior Leadership Team. This week we had a whole afternoon talking about values and our culture. I am putting time in to making sure the team is cohesive and together. To increase the bonding between all of us and I wanted it to happen whilst I were still here. Everyone has done Strength Finder. We did the online assessment and then one-to-one coaching with coaches."

"We have a clearly defined governance structure. I am the Chairman of the Board. We have 8 Board members, and [the Executive Director] reports to the Board. I have no operational role. The Board's role is to work with the staff and constituents to develop strategy. It is to hire, evaluate and if necessary, change the Executive Director (ED). It is to ensure that the organisation will remain fiscally viable. The extent of my decision-making with [the ED] is in discussions involving lots of people about strategy. And so that's where we can have some push and pull."

"Yes, we do disagree but there are rarely any disagreements. We normally discuss everything until we figure it out. We really respect each other's opinions. I worry that some of the senior managers may not be able to be Directors. Some of the junior managers are actually better placed than some of the senior managers and I don't know how to navigate this yet. There may be expectations from the senior managers that it would be them. We really need to get the dynamics right to get the right model that works for us."

"Our governance is not very effective and our current Board needs to change...We need local people on the Board and we need a much more active Board including women. I have been very lonely all this time. I would go to the Board for major decisions, but all other things would be decided by myself. We have procedures on what I can approve etc and what my limits are as a Director."

"Our Board of Trustees is the focal point of our governing structure, and I have always wanted to put in place strong governance systems. We were able to put together a strong Board charter that included conflict of interest documentation, the role of the Board, and the kind of help we needed. During this process, we also checked that everything was in order with the Trust: are we properly registered? Do we have all the requisite Trust documents? We also recruited new Board members with experience in areas where we have gaps."

"I am the Executive Director, and working with me are 11 people, and 4 major projects and many smaller initiatives. Each project manager (there are 3) reports to me, and then we have HR & accounting, communication, and maintenance. So, when I resign, I have to inform the Board and the staff also of course. I have to have written agreement from the President to let me go and to let me look for someone else... and then it depends on their approval of my choice for the next person."

“It has changed a lot since I left. It is a good thing. When you sit on the balcony, you can advise and say I made mistakes and we need to change in to x y z. There is a lot of good change. Instead of having 1 site coordinator, we decided to have 1 regional coordinator so in 1 region there is one person coordinating all. This brought visibility at a regional and national level. It improved what I did before. Also we have a COO – who takes over the management for transparency and ensures good systems are in place. The COO also manages HR, equipment and so on. That was a good change. I am happy with how it changed. Things were built with the team and the Board. There is the strong link between the Board and senior management. That has brought stronger organograms and systems in place.”

“The community aspect has gotten a specific department which is good and that includes livelihoods and value chain and construction. It was a really good change that came out from me leaving. In terms of systems and procedures, there were lots of changes with management systems and administration etc. Those are now highly developed.”

“It’s based on the non-profit model. We have a Board of Directors and they have the fiduciary responsibility and also ensuring that we meet the rules and regulations of non-profits and that our mission is honoured, and the Board and staff understand the mission, and we negotiate that together. It’s really a separation of powers, and everything relating to programmes, implementation design, monitoring and review, etc is entirely a staff function. We don’t get into it except to be kept informed, and to know what challenges they face, and where they need help, and whether it’s a case of us having me or others bringing in some technical support.”

“Right now, there are three of us as Directors. And we have lots of discussions and meetings and if we disagree, we figure it out. Sometimes we get external help, so if things really are not going so well between us, we get external support to make sure that someone from outside can help us.”

“They first have conversations with each other, and I would say 90% of things are sorted out that way. They make decisions; they bring them to the table. They have monthly meetings and are together

in one room every month. They work through all the decisions. If there are disagreements - they talk through why, and it takes days of meetings, but they get through a lot. They make those decisions and move on. We have provided a lot of support by providing different tools to help mediate conflict and having difficult conversations, so they have a tool kit to go to when things get difficult. We have a Head of People and Well-being who ensures that there is a space for these conversations and that they are not avoided.”

“If they can’t agree, it might go to an existing committee involving specific people and/or areas of concern (e.g., conservation work, organisational, or operational). So they’ll then do it through one of the committees or form a temporary sub-committee to deal with the issue at hand specifically. Each committee has its area of expertise. It might come to that committee to decide if it falls in their area. If that doesn’t work, and there’s still an issue, then we’ve had multiple trainings on crucial conversations. They have crucial conversations (using the published conflict resolution process) if it’s between two people and doesn’t seem to be getting resolved.”



If there’s something that is under [the Executive Director’s] responsibility, he’s the one that makes that decision. So I would never really override his decisions. I think if you have to override decisions of your Executive Director, then you’ve got the wrong person there.

Board



What I want to do now going forward, that I think will really help with the governance and accountability, is to create a formal Board. For all this time, we've never had a formal Board. We've had an advisory committee, which has been incredible, but I think now, based on what I'm learning, based on what I'm hearing from others, and based on just a real sense of this being the right time, I want us to create a formal Board.

Do you have a Board? How does it work? What challenges have you faced? When setting up a Board, do you have any recommendations or things to look out for?

Whether the organisation has never had a Board or has had a Board since its inception, it is critical, particularly at times of transition, to have a well-functioning Board and for the Executive Director or the Co-Directors, to be accountable to that Board. The following excerpts highlight the range of Board structures that exist along with tips for those who are considering setting up a Board. Key points are bold for impact.

*“A corporate Board has structure; so, **why do we avoid structure in conservation?** We then hired a governance expert to work with us, and now we have a Board charter with clear terms of reference, among other things. We have two committees: audit and risk, and strategy and fundraising, and each Board member has a clear role. The Executive Director cannot objectively choose Board members but can make recommendations. **The Board needs to be independent** and have a larger say in the process. **Boards contribute to sustainability, and it's time for conservation organisations to prioritise governance more. This will ensure accountability, openness, and efficient decision-making** by putting in place a structured governance system, which will, in the end, result in improved conservation efforts and long-term impact.”*

*“The local laws of NGOs state that we have to have a Board of between 5-7 people. When the organisation was established, the Board was established at the same time. The Board members are from different professional fields such as legal, media, rural development, a researcher from the university etc. So, we can get advice from different fields. That is how we set up our Board. Usually, we meet a few times a year for annual meetings. We report and they give us advice. We haven't faced many challenges with the Board as we don't engage with them all year. **But we do have a rule to rotate Board members once every 3 years.** If people want to move on or needs to be changed this is the time to make some changes.”*

*“My Board is effective when I engage them, but they have to be engaged by me. There isn't a lot of engagement from their side - they wait for me to communicate. It suits me. For this transition process, they were really good, and I really valued their input and support. They have taken it seriously and know it's a big deal. They told the team they are open and available to the whole team. **Try to have a Board meeting in person with the team. The team comes and presents and that way the Board sees what goes on.***

The team feels valued, and the Board feels connected. The Board must feel connected. There are 7 of them. We have 2 big Board meetings a year and the rest [are] via email. We have overseas Board members and so a lot depends on their availability.”

“Selecting the Board: I wanted someone who was good in finance so they could review audits etc. I wanted someone who was good in technical support on research. It is good to have the government perspective - things like benefits etc. **After 3 meetings of non-attendance, we send a letter to the Board member to leave. People have to engage.** Getting external facilitators to engage the Board is helpful. It is **so important to have people who are committed.** You need someone who has time and a balance of men and women.”

“We don’t use this Board in any functional way other than signing documents, authorising financial procedures, objectives, budget financial report etc. As we move into succession - do we establish a Board? We may consider creating a voluntary advisory Board. Also, I am not sure who would be on an advisory Board that would be really useful. **How many actually have these types of insights. For fundraising. For critical thinking. For influence.**”

“I was very picky when I created the Board. I wanted people who get along with me. People who can advise and know the values we have lived with for so long such as friends and colleagues – that’s how I chose my Board. **I chose people who are very interested in [the country] and have been for their whole life. People who have those special links with the country and its biodiversity.** They don’t have to be scientists or conservationists. They need to be ambassadors for the organisation and who can speak about the organisation. They can create links and relationships for the organisation. **You do it, you give your time, you volunteer – it is not about money.**”

“**Ask people that you trust and like.** Start with a smaller Board and eventually bring more people on. **Establish clear portfolios,** so when a Board member leaves, you seek someone to fill that specific portfolio. [Portfolios like] fundraising, chairman, treasurer, strong conservation experience person, a legal person, and an academic person.”

“You basically want a **Board that really supports the CEO a hundred percent.** They also **don’t get involved in the day-to-day.** But are supportive of the CEO and the objectives of the organisation which typically the CEO and Founder would have established.”

“I know I’m a different person in this world. I know, I think I’m very informal and I do things a little bit differently. **I think a Board is really important. But who is really running the organisation? Is it your Board or is it your team?** Our Board is very informal. Of course, we all meet, and we’re always talking, and we’re always updating each other. We have minutes. But it is informal because at the end of the day, there’s no question about obvious loyalty or how I’m going to spend money. My world is this organisation and I want [it] to succeed. So, there’s no question about that. And no one should question my decisions. And I have people who advise, and I take their advice, but I don’t have to. I don’t shut it down. It’s more like “your opinion is valued, and we want to hear it and we’ll use that and then make our own decision.” In this way it’s not as authoritative.”

“**I think trust is so important - really trusting, having the right people and trusting them and empowering them to make those decisions.** A Board should be there for a consult – for example, I’m really struggling with this decision, what do you think? Probably for your own salaries too. If you are stepping away entirely, you probably then need a very strong Board.”

“Starting out, you don’t want too large a Board, because what you want is consensus. The basic approach is fundraising. **Any Board is there to help raise money.** Either by giving themselves, or by facilitating, such as, by introducing staff or Executive Directors to new potential donors. **They also validate the organisation to donors by expressing their confidence in the organisation and its mission.** And so you want 1 or 2 people on your Board that have deep pockets. Then you recognise all the other people you need and the skills they have. You need someone to help develop a campaign or contact donors, etc. It is a challenge getting the right people.”

“**Keep the Board small.** I think that’s important. Then, you can get a closer-knit Board. You get to know each other. **Make sure it’s very supportive people.** Explain your ethos at the onset.”

Such as, our work is community-owned. Our Board has been very supportive. They have worries, but we always talk through them. **Good communication is critical.** We have a small Board, so we've gotten to know them well, and they know and trust us. **They come to spend time with the team and build up that trust.** But again, it takes time; trust doesn't happen quickly."

*[An] important role of the Board, it is to **make the Executive Director (ED) accountable.** To evaluate the ED's performance and secure that the organisation is being led into the right vision, mission and goals. And also, to **support the ED in the decision process.** The Board needs to **be active and involved.** And, lastly, they need to represent the organisation and find the right connections and the opportunities and also, stopping the ED when a decision might not be the best for the organisation's overall image – like receiving grants from a dodgy donor."*

*"Part of my transition also included the **Board transition, to include women and local people, securing and including diversity on the Board.** So, in the end, my Board was also embraced in a process of transition together with me..."*



I strongly believe that having a strong Board and good governance is the only way for the organisation to succeed. It is the Board that determines if the organisation is working well, as it is in place to support you. The Board's assistance and direction can also lessen the pressure on the Executive Director, enabling more capable leadership and decision-making.

Conclusion

“Succession is very case specific – there is no single approach, except to focus on key or important attributes for the person taking over, as well as their supporting team:

- *Passionate, hardworking, and dedicated individual.*
- *Strong leadership and team building skills that value true participation in programme design, implementation, monitoring and evaluation with short, medium and long-term sustainability and increased self-reliance as critical goals.*
- *Ability to balance organisational spending and fundraising, using resources wisely and strategically.*
- *Strong focus on outreach and collaboration with local communities, leaders, government, scientists, donors and other conservation NGOs. Recognising that everyone has a role to play toward ensuring desired outcomes, and that these are collective as well as individual aspirations.*
- *Clear understanding of the threats to habitats, species, ecosystem and what interventions would be most impactful, efficient and sustainable.*
- *Skill at story-telling and motivating people to join and support conservation / education initiatives.*
- *There is no perfect leadership – we all learn by trial and error, and from mistakes and when things appear to go awry.”*



I think every journey is unique. It is such a complicated issue, so nuanced and so individualised. There are some broad frameworks, but ultimately it is a journey that requires a lot of time, energy, love, understanding. A lot of empathy, not only for the people around you, but for yourself. I think it's because it's hard. As entrepreneurs, so much of our self-worth and identity is tied up in our organisations, and no one – no one - will understand or appreciate the sacrifices you've made to build the organisation to where it is and how hard you've worked. But you've got to accept that. You signed up for that when you started. You can't do it for the accolades, or even for your name on a plaque. You have to do it because of that core passion and belief. But it comes at a cost when you extricate yourself.

Key Resources

The Founders Mentality Video – From Bain & Company Insights:

<https://www.youtube.com/watch?v=Rp4RCIfX66I>

Bridgespan webinars on leadership

<https://capacityforconservation.org/resource/governing-a-conservation-ngo-a-guide-to-good-practice/>

Two articles on the grief that some Founders experience during/after transitions:

https://ssir.org/articles/entry/the_five_stages_of_founder_transitions

<https://longform.asmartbear.com/identity-selling-sadness/>

Leadership Transition Coaches

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