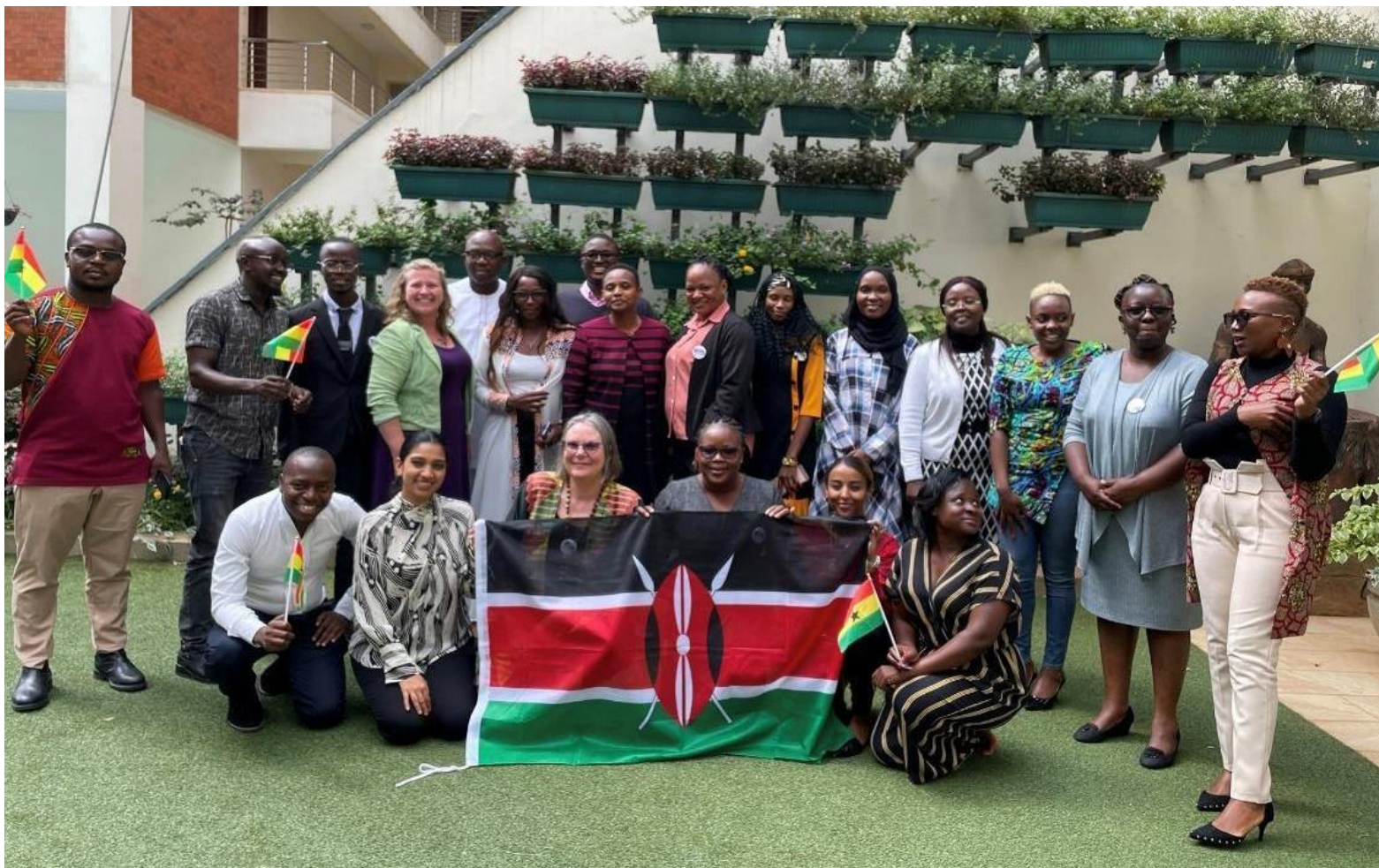


MOMENTUM

Country and Global Leadership



LEADERSHIP SUCCESSION GUIDE FOR YOUTH-LED ORGANIZATIONS



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INTRODUCTION

In 2023, the MOMENTUM Country and Global Leadership consortium collaborated with eight youth-led organizations (YLOs) from five African countries to co-create recommendations and products that address the capacity-strengthening needs of YLOs. The YLOs engaged in this process indicated that the highest priority was the development of leadership succession guidance to direct organizations wishing to remain youth-led when their leaders are no longer young. In response, MOMENTUM tasked Copper Rose Zambia (CRZ), a YLO with experience developing global products on youth leadership, with facilitating the co-development of a leadership guide product with the YLOs. In 2024, CRZ kicked off this process with a virtual scoping meeting and a survey with the YLOs. The survey informed the type of product to be co-developed; the YLOs chose to co-create a leadership succession guide. Following the survey, CRZ drafted the leadership succession guide and conducted virtual sessions with the other YLOs for their input and feedback. Throughout this process, MOMENTUM provided technical assistance to CRZ.

RATIONALE

YLO leadership succession refers to the transitioning of a YLO's senior management team from the founder or outgoing leader to another qualified and promising young leader. Leadership succession is important for YLOs to maintain their youth-led identity, effectiveness, and institutional sustainability. However, the gap in guidance to inform top-level leadership transition remains a critical challenge for YLOs. This user-friendly guide for YLOs addresses this gap. It covers key aspects, processes, and stakeholders to include when initiating, planning, and implementing leadership succession. The guide is intended for use by YLOs and adult-led organizations that support the capacity strengthening of YLOs. It aims to support YLOs that are embarking on leadership succession to do so as effectively and efficiently as possible. This guide focuses on leadership succession at the day-to-day operational leadership and management levels; it does not guide succession at the board level. It also assumes that the YLOs using this guide will have already decided to transition their top leadership and have reflected on the considerations outlined in the "How to Use the Guide" section. Internal candidates (from within the YLO) will be prioritized based on their experience. If an external candidate is deemed necessary, standard human resources (HR) recruitment procedures will be followed. Overall, the YLOs who developed this guide recommend allocating sufficient time to complete this process. They envision the succession process to take six to nine months.

The guide aligns with other products and tools developed by other YLOs and youth networks, such as [CHOICE for Youth and Sexuality](#) and [YIELD Hub](#). YLOs are encouraged to visit these webpages as well as [MOMENTUM resources](#) for other capacity-development tools and guidance.

HOW TO USE THE GUIDE

YLOs are advised to consider the following tasks in preparation for executing the nine steps outlined in the guide. Meeting these prerequisites can help ensure the YLO is well set up in terms of policies and practices to complete all steps:

- Establish clear standards for how youth leaders reach the eligible age for becoming their YLO's leader, as well as how leaders age out of the position. These age brackets will depend on the policies and practices in place in your country and how your organization chooses to align with the country and global definitions of youth and young people.

- Develop clear HR department policies for recruiting and selecting staff. This includes the application and interview process, which should have standardized forms that staff use for interviewing, scoring, and selecting candidates, as well as informing candidates of the hiring decision.
- Create clear guidance within your staff handbook or HR department policies on how staff should provide notice when leaving their position, particularly how much time the YLO leadership should give their organization prior to leaving the role.

If your YLO already has these policies and practices in place, the leadership succession process is a good time to review them to make sure they still align with what staff want and need.

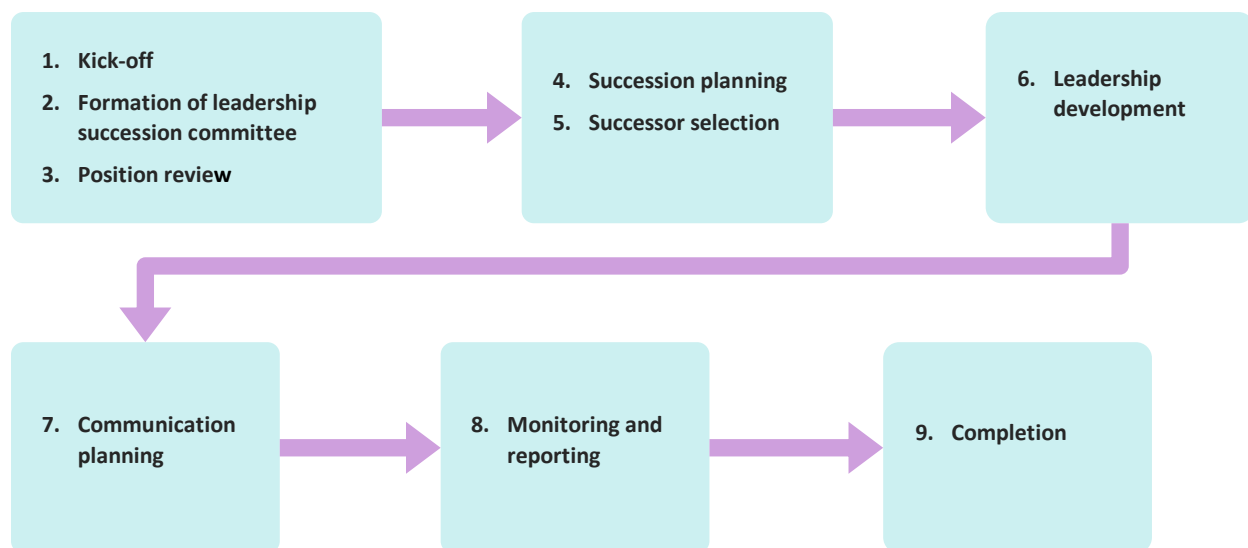
THE YLO LEADERSHIP SUCCESSION GUIDE HAS NINE STEPS:

- | | | |
|------------------------|---------------------------|-----------------------------|
| 1. Kick-off | 4. Succession planning | 7. Communication planning |
| 2. Committee formation | 5. Successor selection | 8. Monitoring and reporting |
| 3. Position review | 6. Leadership development | 9. Completion |

Each step is accompanied by a brief description, followed by the purpose, key processes (as applicable), and main outputs.

The steps in this guide can be used in two ways: the extended or the rapid process. The extended process guides a YLO through all nine steps sequentially, so they complete one step before moving on to the next. In the rapid process (Figure 1), used when time and resources are constrained, the YLO takes steps 1–3 concurrently before moving on to steps 4 and 5, which can also be done concurrently. The remaining steps (steps 6–9) are then completed sequentially. A YLO that has already begun the leadership transition process may apply any of the nine steps that are most relevant to support this process. As recommended previously, please refer to the prerequisite tasks prior to initiating Step 1.

FIGURE 1: RAPID LEADERSHIP SUCCESSION PROCESS



Note: Boxes with multiple steps show where they can be done concurrently.

STEP-BY-STEP GUIDE ON LEADERSHIP SUCCESSION FOR YOUTH-LED ORGANIZATIONS

STEP 1: KICK OFF OF THE PROCESS

This decision-making step is realized when the YLO founder or outgoing leader relinquishes or is ready to relinquish their leadership role and duties. It involves either the self-driven or externally influenced decision point at which the outgoing YLO leader/s or the leadership succession committee, board, or its equivalent decides to embark on identification, selection, mentoring, and handing over of the YLO's day-to-day leadership to another qualified person. This step can be instantaneous or more structured depending on the YLO's organizational capacity and the presence of a trigger factor (explained in Table 1).

PURPOSE

This step aims to enable the YLO leader or existing board-level leadership or its equivalent to communicate their commitment and decision to ensure that a youth leads the YLO. This step allows the outgoing leader to continue to engage in the YLO in other suitable positions, should they desire to do so, and paves the way for the subsequent YLO leadership succession stages. Stakeholders include the outgoing YLO leadership and the YLO board or its equivalent, where available.

KEY OUTPUTS

The main deliverable from the leadership succession kick-off is the announcement of the current YLO leader's impending or sudden departure to the YLO staff and volunteers. This signifies the kick-off of the leadership succession process.

TABLE 1: TRIGGERS FOR YLO LEADERSHIP TRANSITION

Trigger	Description
Natural progression	This occurs when the outgoing YLO leader has exceeded the legal youth bracket according to the policies in their organization and country. The organization, therefore, undertakes a leadership change to maintain its identity as a YLO. When the YLO leadership foresees an impending departure of the outgoing leader due to factors such as job changes or contract expiration, they proactively initiate leadership development to ensure a smooth transition and continuity of leadership.
Strategic alignment	This occurs when the YLO requires a suitable youth leader who fits the organization's shift in goals or strategies.
Sudden decision	This trigger occurs when an outgoing youth leader unexpectedly leaves the office. This could be due to unforeseen circumstances, such as a family emergency, health issues, or other factors prompting leadership changes.

STEP 2: FORMATION OF A LEADERSHIP SUCCESSION COMMITTEE

This second step involves forming or confirming the person(s) or team who will champion the critical steps of identification, selection, mentorship, and unveiling of the YLO's new leadership.

PURPOSE

This step aims to form a team, referred to as the leadership succession committee, to champion the succession process and to clarify the team's roles and responsibilities.

KEY PROCESSES

The leadership succession committee or YLO board is responsible for identifying, selecting, providing mentorship support, and announcing the new YLO leadership after completing the leadership succession process. The leadership succession committee should include the roles outlined in Table 2.

TABLE 2: LEADERSHIP SUCCESSION COMMITTEE ROLES AND RESPONSIBILITIES FOR LEADERSHIP SUCCESSION

Title/Position	Role in YLO Leadership Succession
Outgoing YLO leader	<ul style="list-style-type: none">• Forms the transition leadership succession committee working with the board or its equivalent where available.• Prepares and coordinates the implementation of the YLO leadership transition plan.• Drafts the job description for the incoming YLO leader.• Starts preparing a handover document with details such as monthly and annual tasks, points of contact, knowledge management, etc., for the incoming leader.
HR focal point/ representative drawn from or endorsed by the YLO board or its equivalent	<ul style="list-style-type: none">• Convenes transition team meetings and takes notes.• Finalizes the job description for the incoming YLO leader.• Works with the outgoing YLO leader to identify a small pool of candidates or individual for consideration by the YLO leadership.• Guides the team in identifying areas for mentorship and training for the pool of potential leaders or the person considered to take over YLO leadership based on the final job description of the incoming YLO leader.• Prepares the mentorship, training, and apprenticeship schedule for the identified YLO leadership.
Communication representative drawn from or endorsed by the YLO board or its equivalent	<ul style="list-style-type: none">• Leads transition leadership communication with the internal and external critical stakeholders as mandated by the full committee.• Plans and organizes the ultimate communication event, the handover, and the unveiling of the new YLO leadership.
Board member	<ul style="list-style-type: none">• Oversees the entire leadership succession process.

KEY OUTPUTS

The outputs from this step are completing the tasks and responsibilities outlined in Table 2, coordinating the team meetings calendar, and organizing the first team orientation meeting.

STEP 3: ORGANIZATIONAL LEADERSHIP POSITION REVIEW

This step involves determining or affirming the position(s) classified as leadership within the YLO. It is an essential step for YLOs to ensure they have the right leadership to achieve their strategic objectives. In this step, YLOs should ensure there is comprehensive documentation, including detailed charters and job descriptions that clearly outline responsibilities and expectations for each leadership position.

PURPOSE

This step aims to harmonize expectations around the job description for the incoming YLO leadership, including roles and responsibilities. It is also a critical step in enhancing institutional sustainability as the job description must align with the delivery of the organization's vision, mission, and strategic priorities.

KEY PROCESSES

Members of the leadership succession committee, including the outgoing YLO leader, HR focal point, and/or board member, will prepare the job description for the new YLO leader. This will be based on the YLO mission and strategic objectives or priority areas, coupled with their professional experience and the standard roles for a YLO leader. Other key stakeholders may be asked to contribute to identifying the roles and responsibilities. The outgoing leader leverages their experience to craft a description aligned with the YLO's mission and goals. The HR focal point (if available within the YLO) should ensure that the job description meets organizational and national standards and covers all leadership aspects. Finally, the board member provides strategic oversight, guaranteeing that the description reflects the organization's priorities and encompasses the necessary responsibilities.

KEY OUTPUT

The main output of this step is the development of a job description for the leadership position(s).

STEP 4: SUCCESSION PLANNING

The leadership succession planning step involves developing a schedule of leadership succession-related activities within a particular period.

PURPOSE

This step aims to consolidate and communicate the linkages of key succession activities, along with the responsible persons and key task outputs. It factors in actions to allow others who are qualified and available in or outside the organization to mentor and onboard the identified YLO leader. Furthermore, it helps to create buy-in for the incoming YLO leader from colleagues and key stakeholders. Where the incoming YLO leadership is not identified, the leadership succession plan outlines actions for the person's identification and appointment.

KEY PROCESSES

The leadership succession committee leads the formulation of the leadership succession plan. This team will convene and draft a formal succession development plan, highlighting key processes for identifying successors; develop a communication roadmap for the transition, means of monitoring and reporting the succession progress, and plans for unveiling who the new leadership will be; and create an onboarding guide for the new leadership. The team also outlines how mentorship will be provided from the outgoing leadership to the incoming leadership, including coaching, shadowing, and capacity-strengthening opportunities.

The HR focal point, the board, or outgoing leadership will identify and facilitate training opportunities for the incoming leadership to support their development and readiness for the new role. In the absence of a formal committee, the outgoing leadership is responsible for developing the succession plan with support from available key stakeholders.

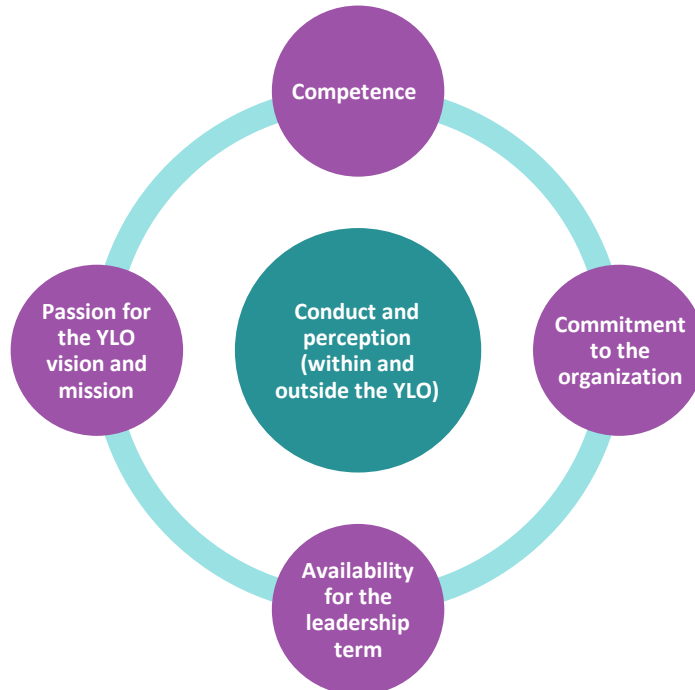
KEY OUTPUTS

The main output from this step is a leadership succession plan with clear timelines.

STEP 5: IDENTIFICATION AND SELECTION OF POTENTIAL SUCCESSOR(S)

In this step, the YLO leadership and leadership succession committee identify strong performers within the organization based on essential leadership qualities, hard work, and demonstrated dedication (outlined in Figure 2). Additionally, staff appraisal information can be incorporated to identify the leader.

FIGURE 2: ILLUSTRATIVE QUALITIES OF AN INCOMING YLO LEADER



Note: These qualities are selected attributes identified in the co-creation process but are not an exhaustive list of YLO leader attributes. YLOs are advised to add qualities, use appraisal records, and create questions and ratings as per organizational bylaws and policies.

COMPETENCE: The incoming leadership should demonstrate the ability to ensure work is done successfully or efficiently, combining skills, knowledge, and experience to achieve desired outcomes for the organization.

COMMITMENT TO THE ORGANIZATION: The incoming leadership should consistently demonstrate dedication to the organization's mission, contributing positively to its goals, and actively participate in its development and success. The incoming leadership should show good judgment, reliability, and loyalty through everyday actions and decisions.

CONDUCT AND PERCEPTION: The incoming leadership should consistently display professionalism, integrity, and respect, fostering trust and a positive reputation within the organization. Furthermore, they should be dependable and present themselves in a way that reflects well on both themselves as an individual and the organization.

PASSION FOR THE YLO VISION AND MISSION: The incoming leadership should have a powerful driving force, be enthusiastic, creative, and dedicated, making even the most challenging tasks feel fulfilling and meaningful.

AVAILABILITY FOR THE LEADERSHIP TERM: The incoming leadership must be consistently present and ready to guide, support, and make decisions for the betterment of the team, even when challenges arise.

PURPOSE

The step aims to identify and select potential successors for the YLO outgoing leadership based on their leadership qualities, hard work, and dedication, as well as their performance as assessed through staff appraisals. This step ensures a smooth transition of leadership and successful performance when the outgoing leadership is no longer involved in the organization. The leadership succession committee should ensure that the incoming leadership fits within the youth age range (as defined in their country) and that the entire identification and selection process is inclusive, nondiscriminatory, and allows for the selection of diverse candidates (e.g., gender, people with disabilities, etc.).

KEY PROCESSES

YLOs should apply their HR recruitment policies throughout the process of identifying potential successors. However, in instances where a YLO does not have written criteria, the leadership succession committee or the outgoing YLO leadership (usually the outgoing leader) and the HR focal point person should develop criteria consistent with the YLO's practices and values (please refer to the prerequisite tasks). Following a thorough search for suitable candidates within the organization, the committee may consider external candidates, but only after all internal options have been explored. External candidates should meet the stipulated criteria to be considered for the leadership position.

The HR focal point spearheads the identification and selection of the potential successor, with the support of the leadership succession committee where available. Upon selection, the HR focal point also informs the candidate of their selection as leader of the YLO. If available, the outgoing YLO leader may support the HR focal point by developing the key written competencies and qualifications required of the potential successor, as well as discuss the handover document with the incoming leader. The board or its equivalent should oversee the entire process to ensure there is transparency during the identification and selection of the YLOs leadership.

KEY OUTPUTS

The main output from this step is the successful identification and selection of a potential successor(s) and announcement of incoming leadership to the organization when finalized.

STEP 6: LEADERSHIP DEVELOPMENT

This is a critical stage of leadership succession as it involves equipping the new leadership with the necessary skills to perform and excel in their new roles. This process involves apprenticeship and adaptability, enabling the incumbent leadership to guide the incoming leadership to successfully run the YLO.

PURPOSE

The purpose of this step is to equip and prepare the incoming leaders with critical skills required to excel in the position, including navigating change successfully, adapting to the new role, and enhancing their competency in strategic thinking, effective communication, team dynamics, and other important areas. Where possible, YLOs can offer leadership apprenticeship sessions to other rising leaders in the organization.

KEY PROCESSES

Apprenticeship is crucial for preparing future leadership and ensuring smooth leadership transitions. A skills assessment should be conducted by the HR focal point, with support from the leadership succession committee, and a self-assessment completed by the incoming leadership to understand the new leader's strengths and capacity and develop a plan to build existing and/or missing skills. Depending on assessment results, the YLO should employ relevant capacity-strengthening strategies. These could include pairing the incoming leader with the outgoing mentor(s) to provide guidance and support for capacity strengthening in various roles. Structured capacity-development initiatives should be offered to equip the incoming leadership with the necessary skills and knowledge to address challenges, such as knowledge gaps, mismatched expectations, limited experience, and competing priorities.

The apprenticeship process is designed to cultivate a pool of promising leaders by providing them with firsthand experience, mentorship, and training. This approach equips them with the essential skills and competencies required to excel in future leadership roles. Through practical learning and exposure to various aspects of the organization, apprentices develop the confidence, problem-solving abilities, and strategic thinking necessary to drive organizational growth and success. The capacity-strengthening strategies can be implemented in-house or externally depending on the availability of funds.

KEY OUTPUTS

The key output from this step is the provision of leadership development through various approaches, not limited to apprenticeship, coaching, and training.

STEP 7: COMMUNICATIONS PLANNING

Communication for leadership succession involves dissemination of information internally throughout the leadership change process, and externally once the incoming leadership is on board.

PURPOSE

Internal communication aims to provide transparent information about the change, timeline, and incoming leadership to the YLO staff. Communication with staff manages expectations, reduces anxiety, and fosters stability within the YLO. This step also helps maintain employee confidence and engagement. Open communication demonstrates respect and allows for adjustment while introducing the incoming leadership, which builds trust and confidence in the organization's future direction. External communication with key YLO stakeholders helps ensure a smooth transition and completion of the process.

KEY PROCESSES

The communication representative, drawn from the leadership succession committee, board, or its equivalent, communicates any leadership transitions. This process involves developing a clear communication plan for transitioning the YLO leadership. During this time, formal communication channels will be used to communicate with all stakeholders involved in the leadership succession process. The YLO should aim for a balance between feasibility and thoroughness. The YLO communication focal point should communicate critical milestones related to the YLO leadership succession process and share only necessary and useful information with the key stakeholders, as highlighted in Table 3.

TABLE 3: COMMUNICATIONS PLANNING FOR KEY AUDIENCES

Key communication points	Internal stakeholders	External stakeholders
Announcement of the leadership succession process	YLO members, project teams, board members	Donor, partners, general public
Timeline and key milestones	YLO members, project teams	Donor, partners
Selection criteria and process	YLO members, project teams, board members	Donor
Selection of the new leader	YLO members, project teams, board members	Donor, partners, general public
Transition plan	YLO members, project teams, board members	Donor, partners
Ongoing updates and progress reports	YLO members, project teams, board members	Donor, partners

KEY OUTPUTS

A communication plan outlining clear messages and channels to guide stakeholders through a period of change.

STEP 8: MONITORING AND REPORTING

The leadership succession monitoring and reporting stage should involve defining clear, measurable key performance indicators (KPIs) to assess the effectiveness of the succession plan and the performance evaluation of the selected YLO leader. These KPIs should track progress on leadership succession activities throughout the process and individual performance of the new YLO leader to the YLO board or its equivalent.

PURPOSE

The purpose of leadership succession monitoring and reporting is to track and report on the implementation of the YLO leadership succession plan. The YLO will track the progress of key milestones to identify successes or gaps so that adjustments can be made as needed to complete the succession process on time, within budget, and in the scope of planned activities. It also helps guarantee a successful leadership transition and minimizes disruptions to the organization. In addition, monitoring will include the individual performance of the incoming leader. This process will be done during a three- to six-month probation, depending on the YLO. KPIs may include the number of leadership succession key milestones achieved and number of training and mentorship sessions attended by the incoming leader. However, specific KPIs will depend on the goals and strategic objectives of each YLO.

KEY PROCESSES

The leadership succession committee and HR focal point will define measurable milestone-based KPIs to track progress. The committee then monitors progress and reports to key stakeholders. The committee can conduct regular reviews, with input from outgoing leaders and potential successors. The YLO will use feedback from the committee to refine the leadership succession plan as needed. The leadership succession committee also plays a critical role in continuous communication based on data and feedback. It implements adjustments to keep the plan effective in developing future leaders. The HR focal point will play a crucial role by overseeing training, ensuring policy compliance, and supporting the committee and leaders in defining KPIs and reporting progress. Throughout the process, the YLO board will maintain ultimate oversight of monitoring and reporting, guaranteeing effectiveness and adherence to established guidelines.

KEY OUTPUTS

The main output from this step is the development of leadership succession progress reports or meeting notes.

STEP 9: COMPLETION OF THE NEW YLO LEADERSHIP SUCCESSION PROCESS AND INTERNAL/EXTERNAL COMMUNICATIONS

This step involves completion of the YLO leadership succession process, including the formal unveiling of the new leadership. It is crucial to communicate the end of the leadership succession process and to host a formal welcome or unveiling event for the new YLO leadership. This displays transparency and dedication, and nurtures confidence among current YLO staff, members, and key stakeholders. It also shows that the organization is well-prepared for the future.

PURPOSE

This step is to signify the end of the YLO leadership succession process and foster a sense of unity among YLO members. It also encourages collaboration, trust, teamwork, and confidence from key stakeholders and welcomes the new YLO leader. The YLO will communicate the end of the process both internally and externally, informing all stakeholders of the new leadership.

KEY PROCESSES

The leadership succession committee, board members, entire YLO staff, volunteers, and key stakeholders will collectively welcome the new YLO leader. Internal and external communication will be made via email and, where possible, in-person introductions can be made. Additionally, a date should be communicated for the incoming YLO leader to share their vision and ways of working, among other areas, in response to staff questions and concerns using any suitable method.

KEY OUTPUTS

The main output from this step is unveiling the new leader for the YLO and a successful leadership transition.

CONCLUSION

Leadership succession is a critical and continuous aspect of maintaining a YLO's youth identity. It creates space for YLOs to reflect on their organization's policies and practices and ensure alignment with their vision, mission, and values. By investing in youth leadership development, YLOs and their adult-led donor and partner organizations can equip future leaders to navigate complex challenges and set the organization up for continued success. This guide outlines nine steps and the prerequisites to consider prior to initiating the process; however, the authors encourage YLOs to adapt the guide to best fit their organization's needs and vision. As mentioned earlier, YLOs using this guide are encouraged to review resources by other YLOs and youth networks, such as [CHOICE for Youth and Sexuality](#), [YIELD Hub](#), and [MOMENTUM](#) for additional information and guidance.

Acknowledgements

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Suggested Citation

Copper Rose Zambia, Girls in STEM Initiative and Empowerment Centre, Mwanza Youth and Children Networking, Youth Advocacy and Rights Opportunities, Youth and Adolescent Reproductive Health and Nutrition Network, Youth for Sustainable Development, The Zanzibar Fighting Against Youth Challenges Organization, and Zambia YLO Men of Honour. 2024. *Leadership Succession Guide for Youth-led Organizations*. U.S. Agency for International Development, MOMENTUM Country and Global Leadership.

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