

Passing the Mantle:

An Exploration of Leadership Transitions at the Alvin Ailey American Dance Theater

by Amanda J. Nelson, Ph.D.
Virginia Tech
School of Performing Arts
195 Alumni Mall (0141)
Henderson Hall, Rm 344
Blacksburg, VA 24061
Email: amandajnelson@vt.edu

INTRODUCTION

February 29, 2008

Dear Friends,

I want you to be among the first to learn of my decision to step aside in June 2011 after serving as Artistic Director of Alvin Ailey American Dance Theater for more than 20 years. Since 1965 when I joined as a dancer, I have been passionately committed to this company, and I will remain fully active as Artistic Director for the next three years. I will then become Artistic Director Emerita and serve as an ambassador for the company for many more years to come.

As we approach our 50th anniversary, it seems appropriate to consider how best to advance the artistic direction of the organization under new leadership. I have held this company in trust for Alvin Ailey, always feeling that he had placed in my hands not a mere company but a living, breathing spirit. It is now time for me to pass on the great gift that I have held, making sure that the next hands to receive it are strong and capable. . . .

- Judith Jamison, Artistic Director, Alvin Ailey American Dance Theater¹

Between the years 2008 and 2013, the Alvin Ailey American Dance Theater navigated four significant artistic and administrative leadership transitions: Artistic Director, Director of The Ailey School, Artistic Director of Ailey II (the junior company), and Executive Director. All four of these transitions involved leadership roles held by women with significant tenures at the organization.

This article explores succession through observations and reflections of some of those who experienced, firsthand, this series of rapid transitions.² As a member of the management team during this time, I had a front row seat to these key leadership changes. I acknowledge my positionality within this study: I had a high level of access to and an extensive pre-understanding of the people and processes involved and engaged in these successions.³ Multidisciplinary artist and cultural manager Pascale Landry suggests that we can “approach

¹ 2008 excerpt from letter sent to Ailey donors.

² Note: A condensed version of this article was presented at the 2023 AAEE conference.

³ Eric Patton and Steven H. Appelbaum, “The Case for Case Studies in Management Research,” *Management Research News* 26, no.5 (2003): 68.

succession as a practice that is constructed by the actions of and interactions among actors."⁴ To examine these successions from a variety of viewpoints, shared from a diverse group of *actors*, I employed convenience sampling, interviewing current and former staff members in various roles across departments of the Ailey organization, as well as patrons of the company:

- Dacquiri Smittick Baptiste, Production, 2004-2009; 2010-2019
- Tiffany Batifort, Development, 2011-2015
- Emily Berger, Development, 2007-2011
- Justin Garlinghouse, Development, 2002-2009; 2010-2023
- Sharon Gersten Luckman, Director of Development 1992-1995; Executive Director 1995-2013
- Anonymous Patron
- Anonymous Patrons (husband and wife, longtime supporters of the company)
- Melanie Person, The Ailey School, 1999-present
- Lynette Rizzo, Marketing, 2000-present
- Kristin Colvin Young, Production, 2000-2023

My aim was to look back, from multiple perspectives, to explore how one organization navigated four key leadership transitions in a relatively short period of time. Through semi-structured one-on-one interviews, I posed a series of questions, inviting former colleagues and patrons to reflect back on their individual experiences with each succession, as well as to share their overall impressions of the people and processes involved in the planning and implementation of the leadership transitions. Open-ended questions facilitated deep and thoughtful discussion, allowing each interviewee to express thoughts and feelings about, as well as learnings from, these successions. I conducted the interviews in the spring of 2023, ten or more years after the successions themselves had taken place: The significant time and space between the lived experiences and the interviews may well have amplified some memories, while muting others. In reviewing interview transcripts, I had an acute awareness of my close proximity to the subjects and subject matter. I had experienced, myself, the disruptions, challenges, as well as the opportunities and excitement that surrounded these leadership transitions. What follows here are observations and reflections shared by others who also worked through these successions.⁵

CONTEXT: THE BACKDROP FOR CHANGE

"Succession doesn't happen in a vacuum. It happens in the real world."
-Tiffany Batifort, Former Grant Writer, Alvin Ailey American Dance Theater⁶

Founded in 1958, the Alvin Ailey American Dance Theater is one of the premier modern dance companies in the world. Each year, the Ailey organization reaches nearly 500,000 people around the globe through performances, education, and community programs. The organization is comprised of the Alvin Ailey American Dance Theater, The Ailey School (dance classes and training, including a BFA program offered in conjunction with Fordham University), Ailey II (a

⁴ Pascale Landry, "A Conceptual Framework for Studying Succession in Artistic and Administrative Leadership in the Cultural Sector," *International Journal of Arts Management* 13, no. 2 (Winter 2011): 54, <https://www.jstor.org/stable/41721097>.

⁵ Sandra Corlett and Sharon Mavinin, "Reflexivity and Researcher Positionality," in *The SAGE Handbook of Qualitative Business and Management Research Methods: History and Traditions* (London: SAGE Publications, Ltd., 2018), 382, accessed October 30, 2023, <https://doi.org/10.4135/9781526430212>.

⁶ Tiffany Batifort Zoom interview with author, March 13, 2023.

junior dance company that serves as a bridge from training at The Ailey School to the professional field), Ailey Arts in Education and Community Programs (programs for public school children and community members in New York, across the United States, and around the world), and the Ailey Extension (dance and fitness classes offered to the general public). The organization's flagship building, one of the largest facilities dedicated to dance in the United States, is located in midtown Manhattan.

For many, the year 2008 is remembered for the global financial crisis. But, for the Ailey organization, 2008 was a time of celebration: the 50th anniversary of the founding of the company. Fifteen months of celebratory events, performances, and special projects were planned. Importantly, we used the anniversary to "elevate the organization" to increase visibility through expanded community projects and partnerships⁷ and raise funds.⁸

Gender and Race

"If Judith Jamison, Denise Jefferson, Sylvia Waters, and Sharon Luckman hadn't been in the positions that broke barriers, I wouldn't be sitting here now."

- Dacquiri Smittick Baptiste, Vice President and Chief Operating Officer, Orpheum Theatre Group, Memphis, Tennessee and former Ailey staff member⁹

By 2008 women had long been at the helm of the Ailey organization. Ailey himself had recognized the talent and ability of the women around him: In 1974, he named Sylvia Waters to a leadership role as artistic director of Ailey II. In 1984, he promoted Denise Jefferson to the position of director of The Ailey School. And, in 1989, shortly before his death, Mr. Ailey asked Judith Jamison to succeed him as artistic director of the company. This triumvirate of women was joined by Sharon Gersten Luckman in 1995, when she was promoted from director of development to executive director.

All of the staff members I interviewed for this project commented on the importance of female leadership to the success of the company. Several reflected that women in visible leadership roles was a significant factor in their decision to join the organization, including former production stage manager Kristin Colvin Young who asserted: "[When] I joined this company, one of the biggest reasons was that it was female-forward and female-driven."¹⁰ Melanie Person, currently co-director of The Ailey School, shared: "For me, that was the appeal of coming to Ailey twenty-two years ago. I wanted to be under female leadership and be around these incredible women and learn from them."¹¹

Those I interviewed had an acute awareness that after the successions of 2008-2013 a *gender shift* happened as leadership positions were, *predominantly*, filled by men. Justin Garlinghouse, formerly the managing director of development, observed "there's [now] a different approach to communications and transparency."¹² And while the interviewees all shared a discomfort in this

⁷ Justin Garlinghouse Zoom interview with author, March 11, 2023.

⁸ During the anniversary season, the organization launched and successfully completed *The Next Step*, a \$35M endowment campaign. The early planning of the anniversary celebration and corresponding endowment campaign protected the organization, as we had collected a number of large pledges from individuals and companies prior to the 2008 financial crisis.

⁹ Dacquiri Smittick Baptiste Zoom interview with author, March 28, 2023.

¹⁰ Kristin Colvin Young Zoom interview with author, March 18, 2023.

¹¹ Melanie Person Zoom interview with author, March 13, 2023.

¹² Garlinghouse.

gender shift, they also shared their respect for and support of the new male leaders: “If you have people who are ready, who are institutionally groomed, we can try to be gender blind”¹³ and “I have the utmost respect for all of the men, [but] we definitely [took] a step in a different direction. This change wasn’t necessarily intentional. But, it was the end result of [hiring] decisions.”¹⁴

While the mission of the organization always emphasized the black experience, founder Alvin Ailey aimed to illuminate the universality of the human condition through dance: “I am trying to show the world we are all human beings, that color is not important, that what is important is the quality of our work, of a culture in which the young are not afraid to take chances and can hold onto their values and self-esteem, especially in the arts and in dance. That’s what it’s all about to me.”¹⁵

As a Caucasian working for this predominantly African American organization, my own experience was that race was always a factor - - sometimes unspoken, but always felt. Former development staff member Emily Berger shared “As a white person it had always been evident to me that this was a unique experience to work in a majority black organization.”¹⁶ Former executive director Sharon Gersten Luckman asserted her own view: “Ailey is a black *led* organization. It’s *led* by the artistic people. . . .The job of [the rest of us] is to get the artistic vision across.”¹⁷

SUCCESSIONS

“I learned many things. You need [a succession] structure, a plan. But everything has to be customized for the people who are in the organization.”

-Sharon Gersten Luckman, Former Executive Director, Alvin Ailey American Dance Theater¹⁸

¹³ Batifort.

¹⁴ Lynette Rizzo Zoom interview with author, March 12, 2023.

¹⁵ “About Us,” Alvin Ailey American Dance Theater, <https://www.alvinailey.org/about-us>.

¹⁶ Emily Berger Zoom interview with author March 21, 2023.

¹⁷ Sharon Gersten Luckman Zoom interview with author, March 27, 2023.

¹⁸ Ibid.

Sylvia Waters, Artistic Director, Ailey II
1974-2011

Denise Jefferson, Director, The Ailey School
1984-2010

Judith Jamison, Artistic Director, Alvin Ailey American Dance Theater
1989-2011

Sharon Gersten Luckman, Executive Director, Alvin Ailey American Dance Theater
1995-2013

Figure: Tenures of women leaders of Alvin Ailey American Dance Theater, 1974-2013.

Succession is a sensitive subject that involves deeply personal decisions that can have significant organizational impact. While succession planning is personal, in a not-for-profit performing arts organization it is also public: Leadership transitions can alter the public face of the organization, its direction (mission, vision, values), and the structure on which the organization is built. The impact of a leadership change is experienced by people at all levels of an organization. Tiffany Batifort, a former grant writer for the organization, reflected that “Succession doesn’t just happen within a role; it happens to everyone in the organization. One has to be mindful of that from beginning to end: from pre-announcement, announcement, living through it, and post-succession.”¹⁹ Patrons (donors, sponsors, audience members) also need to be brought along through the successions.

THE 5 “Cs” OF SUCCESSION PLANNING AND IMPLEMENTATION

From my conversations with staff and patrons, several themes recurred and concepts emerged. Concepts that I believe can serve as guiding principles for successions. I call these guiding principles the **5 “Cs” of Succession**:

- Communication
- Continuity
- Connection
- Care
- Celebration

Each of these guiding principles depends heavily on a sixth “C”: *Context* - - the specific given circumstances both internal to and external from the organization. Sharon Luckman noted that there is no *one size fits all* approach to succession planning and implementation; the plan must be *customized*.²⁰ As organizational psychologist Allen H. Church asserts: “Sometimes under

¹⁹ Batifort.

²⁰ Luckman.

the ideal conditions we are able to create world-class succession processes that are cutting edge and run smoothly. Other times we are on the side of either being too complex and burdensome, or too simplistic and not impactful enough in our approach.”²¹

The team at Ailey approached these transitions, the passing of the mantle, with empathy and intentionality: discussion and planning were coordinated and choreographed. Luckman recalled: “Everyone was given a contract to stay a certain [length of] time, so that we would not leave in the same year as each other. . . . Everything was planned, but then the plan had to be flexible because things changed during the process.”²² Arts management professor and practitioner Rachel Parker asserts: “The uncertainty that comes with change can be very difficult to navigate. It is a time when all logic and reason can fly out the window, and emotions trump everything.”²³ Managing the complexities of a leadership transition (from day to day operations to strategic and artistic planning) requires empathy and understanding.

Though each of the leadership transitions reflected the specific traits of the individual passing the mantle as well as the person accepting the mantle, those I interviewed pointed out the importance of mission as a guidepost for all of the successions. The organization’s mission and values were deeply embedded in staff across the Ailey organization. Founder Alvin Ailey believed that “Dance is for everybody. Dance came from the people and should always be delivered back to the people.”²⁴ Former director of production, Dacquiri Smittick Baptiste, reflected, “Ailey [was] *completely* mission driven. There [was] not one person in that organization who didn’t understand that dance is supposed to ‘be brought back to the people.’ That’s it.”²⁵ A laser focus on the art (dance) and the community (the people Mr. Ailey was committed to serving) guided the organization as it maneuvered through the successions. Looking back at these leadership transitions, each succession required multiple steps, which often overlapped. So, rather than managing one succession at a time, the organization was, in fact, preparing for and implementing multiple leadership transitions all at once.

²¹ Allen H. Church, “Succession Planning 2.0: Building Bench Through Better Execution,” *Strategic HR Review*, 13, no. 6 (2014): 241, DOI 10.1108/SHR-08-2014-0045.

²² Ibid.

²³ Rachel Parker, “Chapter 10, Leading Change: Two Executive Leadership Transitions Through the Lens of Cognitive Restructuring,” in *The Routledge Companion to Arts Management*, eds. William J. Byrnes and Aleksandar Brkić (London: Routledge, 2019), 138.

²⁴ “Delivering Dance to the People,” Library of Congress, <https://www.loc.gov/loc/lcib/0604/ailey.html>.

²⁵ Baptiste.

2008

Succession One– Judith Jamison, Artistic Director

February 29: public announcement of Jamison plan to retire in 2011

2010

Succession One– Judith Jamison, Artistic Director

April 28: public announcement naming Robert Battle Artistic Director Designate

Succession Two– Denise Jefferson, Director, The Ailey School

July 17: Denise Jefferson passes away

July 20: Jefferson obituary appears in *The New York Times*

August 26: public announcement naming Tracy Inman and Melanie Person Co-Directors of The Ailey School

2011

Succession Three– Sylvia Waters, Artistic Director, Ailey II

August 24: public announcement of Sylvia Waters stepping down and Troy Powell assuming role of Artistic Director of Ailey II

Succession One– Judith Jamison, Artistic Director

July: Jamison formally passes mantle to Robert Battle

2012

Succession One– Judith Jamison, Artistic Director

First full season under artistic direction of Robert Battle

Succession Three– Sylvia Waters, Artistic Director, Ailey II

First full season under artistic direction of Troy Powell

Succession Four– Sharon Gersten Luckman, Executive Director

January 25: public announcement of Luckman retirement from Ailey

October 19: public announcement naming Bennett Rink Executive Director

2013

Succession Four– Sharon Gersten Luckman, Executive Director

January: Luckman passes the mantle to Rink

Image: 2008-2013 successions at Alvin Ailey American Dance Theater

Succession One: Judith Jamison, Artistic Director, Alvin Ailey American Dance Theater

“She [Judith Jamison] was the Ailey organization. The transition was momentous.”

- Anonymous Patron²⁶

Following several months of retirement negotiations and organizational planning, on Friday, February 29, 2008, artistic director Judith Jamison publicly announced her intention to step down in 2011. In the months leading up to the announcement, a small group of us worked, behind-the-scenes, to develop a succession communication and action plan.²⁷ We coordinated the internal and external communications so as to have as close as possible to synchronous announcements: “We were in Atlanta [on tour], and there was all this buzz, and Judi [Jamison]

²⁶ Anonymous patrons Zoom interview with author, March 11, 2023.

²⁷ It should be noted that our small working group was focused on Jamison's retirement announcement, but Luckman along with key board members were also beginning conversations and negotiations for Jefferson, Waters, and Luckman's own successions.

called a company meeting,” recalled former production stage manager Kristin Colvin Young.²⁸ Dacquiri Smittick Baptiste, then the company manager, shared “I remember this vividly. It was a Friday. The meeting was on the schedule. I don’t think anybody knew what was [about to happen].”²⁹ The dancers, crew, and a couple of members of the marketing team gathered for the company meeting at the Fox Theatre in Atlanta where the company was performing. Lynette Rizzo, associate director of marketing, observed:

We went to the company meeting, and [Ms. Jamison] announced that she would be transitioning and seeking a new artistic director. . . . And there were a lot of strong emotions in the room. People were crying, and people were shocked. I definitely remember being aware that this was a moment in history that we just witnessed. . . . The way she presented it as her choice, and that [she was] doing this so that the company would have a future beyond [her]. It was clear that she was very much in control of this, and that was reassuring.³⁰

At the same time, executive director Sharon Gersten Luckman had gathered the administrative staff (including The Ailey School and The Ailey Extension) in one of the studios in Ailey’s building in New York City to make the announcement. Our publicist had provided *The New York Times* with an exclusive to the story, with the understanding that the paper would embargo it until that Friday afternoon when the full company would be told the news. Following the internal announcement, several of us made phone calls and sent emails to partners and patrons who we believed needed immediate high-touch communication. Then my team stayed late into the evening to mail out a letter (the letter quoted from at the top of this paper) to donors, sponsors, and government officials.³¹

Fast forward to April 28, 2010, in the same studio where Luckman had first told the administrative staff of Jamison’s retirement, choreographer Robert Battle was announced as artistic director designate. He would spend the next year shadowing Jamison before taking the helm in July of 2011. While the announcement was again well-choreographed, only Jamison, executive director Sharon Luckman, and the board committee leading the artistic director search knew of the Battle appointment ahead of the public communication. *The New York Times* reported that the Ailey organization “would entrust its future to Robert Battle, a 37-year-old outside choreographer who has had a long association with the company.”³² Given the singular nature of this particular leadership transition, I was not surprised by the range of responses shared with me about the selection of Battle as the new artistic director. A patron pointed out that it was helpful that “the introduction of Robert [Battle] was gradual. We were introduced to him over time.”³³ And, Garlinghouse recalled “I was excited to get to know Robert [Battle].”³⁴

²⁸ Young.

²⁹ Baptiste.

³⁰ Rizzo.

³¹ We took care to personalize communications with our constituents, who we often referred to as family. Most of the Ailey family accepted the news and continued to lend their support, but I did have one family foundation officer call me directly; she was convinced that the organization was forcing Jamison out. I was unable to convince her otherwise, and the foundation stopped its annual funding, which had been a grant in the amount of \$50,000.

³² Daniel J. Wakin, “Alvin Ailey Company Names a New Leader,” *New York Times*, April 29, 2010, <https://www.nytimes.com/2010/04/29/arts/dance/29plan.html>.

³³ Anonymous patrons Zoom interview.

³⁴ Garlinghouse.

While another Ailey patron reported that they were “surprised by the choice.”³⁵

Succession Two: Denise Jefferson, Director, The Ailey School

On July 17, 2010 Denise Jefferson passed away from cancer. Since becoming director of The Ailey School in 1984, Jefferson had expanded the student body from 125 to 3,500 young dancers from around the world.³⁶ Unlike the carefully orchestrated succession announcement of Jamison, the organization was now faced with implementing a succession steeped in grief: It was a “very sad time for the organization.”³⁷ The obituary for Jefferson that appeared in *The New York Times* made no mention of a replacement to helm The Ailey School. This was an intentional omission: Luckman wanted the organization and its constituents to have a chance to mourn and to celebrate the work and life of Jefferson before announcing new leadership of The Ailey School.

Because the triumvirate of Jamison, Jefferson, and Waters were all nearing retirement age, Luckman had been having conversations regarding succession planning with each of them. Before her illness, Denise Jefferson had, at different times, suggested both Tracy Inman (a man) and Melanie Person (a woman) as possible successors to her. Preparation for new leadership of the Ailey School had begun before there was an immediate need to fill the role, as Melanie Person recalled:

Tracy and I were already starting to assume some of Denise's responsibilities and that was starting to happen almost organically, not planned. It was when Denise was traveling [to auditions and conferences], he and I stepped in to cover for her without her asking us to do so. . . . When she became ill, [the need for us to step in] accelerated. We were all optimistic that she would push through and survive the cancer, but at some point it became evident that that was not going to be the case.³⁸

Luckman reflected that while she is typically not in favor of having co-directors, she came to believe that this structure was the right choice for the specific situation.³⁹ The announcement of the new co-directors was made on August 26, 2010. Lynette Rizzo, associate director of marketing, shared that this timing “felt respectful . . . to honor Denise [Jefferson] and say goodbye to her, and let that moment stand alone. I think it would have seemed insensitive to immediately announce Melanie and Tracy [as co-directors], and that little bit of space in between felt right.”⁴⁰

Succession Three: Sylvia Waters, Artistic Director, Ailey II

Through a single public announcement on August 24, 2011, Ailey II artistic director Sylvia Waters stepped down and Troy Powell was named artistic director. “Troy [Powell] was [already] in the spotlight. He was choreographing works. Sylvia [Waters] gave him the spotlight before the succession: He was being groomed to take the role by the organization and Sylvia herself.”⁴¹

³⁵ Anonymous patron phone interview with author, March 21, 2023.

³⁶ Margalit Fox, “Denise Jefferson, 65, Director of the Ailey School, Is Dead,” *New York Times*, July 20, 2010, <https://www.nytimes.com/2010/07/20/arts/dance/20jefferson.html>.

³⁷ Garlinghouse.

³⁸ Person.

³⁹ Luckman.

⁴⁰ Rizzo.

⁴¹ Garlinghouse.

And while this transition felt organic to many, Kristin Colvin Young shared “I remember [thinking] we are now one more step away from Alvin [Ailey] with Sylvia’s stepping down. It was big because I knew how close she and Alvin Ailey had been.”⁴²

Succession Four: Sharon Gersten Luckman, Executive Director

Jan Masaoka and Tim Wolfred remind us that the “executive director transition is a crucial moment in an organization’s life: a moment of great vulnerability as well as great opportunity for transformative change.”⁴³ By 2012, the staff of Ailey had navigated two leadership retirement announcements, the death of one of the original members of the leadership triumvirate, and named replacements for the three successions. As challenging as the logistics and coordination of these announcements had been, the inner-workings of the “machine of Ailey” had to adjust and realign with every leadership transition.⁴⁴ Garlinghouse reflected “I remember when Sharon [Luckman] shared that she was going to retire. [I thought] wow, another transition. How many of these can we handle?”⁴⁵ The staff was not the only constituency feeling the stress of the successive changes, a patron of the organization reported “I hate change. I resist change.”⁴⁶

On October 19, 2012, Bennett Rink, the organization’s senior director of external affairs was named executive director. He formally took on the role in January 2013 after the company’s annual New York City Center season. Garlinghouse noted that the Ailey “team was solid - - we had not experienced much churn among staff” so the organization seemed ready for this next leadership transition. Batifort, though excited for Rink, shared that “what I worried about more was who’s going to replace Bennett? That question was more immediate to our team [external affairs].”⁴⁷

THE 5 “Cs” OF SUCCESSION: LESSONS LEARNED

As Landry asserts, “The goal of succession is to facilitate the achievement of the organization’s artistic mission and strategic objectives, thus ensuring its artistic vitality and sustainability.”⁴⁸ Understanding the value of clear and effective *communication*, recognition of the importance of *continuity*, establishment (or re-establishment) of *connection* with patrons and staff, commitment to *care* practices, and the allocation of time and resources to the *celebration* of those who have passed the mantle, all play a role in meeting the goal of succession to ensure “artistic vitality and sustainability.”

Communication

“I have learned the importance of how and when and to whom news gets communicated.”
- Justin Garlinghouse, Former Managing Director, Development⁴⁹

⁴² Young.

⁴³ Jan Masaoka and Tim Wolfred, “Succession Planning for Nonprofits of All Sizes,” *Blue Avocado*, February 18, 2009, <https://blueavocado.org/leadership-and-management/succession-planning-for-nonprofits-of-all-sizes>.

⁴⁴ Baptiste.

⁴⁵ Garlinghouse.

⁴⁶ Anonymous patron phone interview.

⁴⁷ Batifort.

⁴⁸ Landry 2011, 45.

⁴⁹ Garlinghouse.

“A plan for what will be said, when, to whom, and in what media is also important to have in place.”⁵⁰ *Military-like precision* is how several staff interviewed referred to Ailey’s communication plans. Luckman stressed that she had wanted all succession messaging to be clear and direct. One patron observed: “We had the feeling we were part of the organization. . . . [The] communication level was high and that never changed. . . . Communications remained personal and kept patrons connected [to the organization].”⁵¹

As noted earlier, internal communications were carefully planned alongside external messaging. This intentionality was held in high regard by the staff interviewed: “We were given a heads up. And then it was our secret to hold, which has some magic power to it, because you have something so dear, and you feel like, ‘wow, [they] trust us.’”⁵² And, while staff reported being appreciative of Ailey’s internal communication practices for these successions, several staff members shared that “there can never be too much communication”⁵³ and that as external-facing staff “We should know everything because we are interacting with the public. I get there’s a moment when you need to hold information. But, a little more transparency with the staff would have meant less stress for the team.”⁵⁴

The communications landscape has changed since Jamison’s retirement announcement in 2008. At that time, while Ailey had an online presence, direct mail was still the main mode of communication with patrons. “It’s a totally different communication landscape now: With the online communication tools and the level of access that the public has to direct testimony [social media posts] from dancers, from choreographers, from students - - it’s all wide open.”⁵⁵ With the social media channels of today, “news spreads so quickly. There can’t be such a sequencing of communications as we could do in [those] past successions.”⁵⁶

Continuity

“Conveying this is still the Ailey company. There’s a new name on the masthead, but Ailey is still Ailey.”

- Lynette Rizzo, Associate Director of Marketing⁵⁷

As Landry reminds us, “Any discussion of succession must take into account both continuity and change.”⁵⁸ Through messaging and action, the organization focused on maintaining ties to its past, while also embracing new futures. One patron said that there was a “feeling of continuity . . . No matter what was happening [within the organization], we had specific staff members to connect with.”⁵⁹ Batifort observed that when Battle succeeded Jamison, “we braided his story

⁵⁰ Carla Stalling Walter, “Chapter 14: Succession Planning for the Cultural Fine Arts Organization,” in *Arts Management: An Entrepreneurial Approach, 1st Edition* (New York: Routledge, 2015), 376, <https://doi-org.ezproxy.lib.vt.edu/10.4324/9781315713885>.

⁵¹ Anonymous patrons Zoom interview.

⁵² Young.

⁵³ Berger.

⁵⁴ Garlinghouse.

⁵⁵ Batifort.

⁵⁶ Garlinghouse.

⁵⁷ Rizzo.

⁵⁸ Landry 2011, 49.

⁵⁹ Anonymous patrons Zoom interview.

into the Ailey story” so that it seemed a natural extension of the Ailey mission.⁶⁰ Continuity is a delicate balance between past and present, and present and future. “[This was] Mr. Ailey's company, and so how we transitioned Mr. Ailey's legacy [was important]; we had to be so careful, because he handed it down with his own hands. And we had to hand it to the next person, and that [connection was] very fragile.”⁶¹ In retrospect, Young noted that “all we really had was the oral tradition. . . . Nothing was really written down - - all those nuggets of information and wisdom and experience. [We needed to put] pen to paper, keyboard to screen [to safeguard organizational knowledge.]”⁶²

Connection

“Ailey was the first organization I became a patron of . . . there was an inclusiveness and friendliness at that time.”⁶³ Another patron shared that she felt “so connected to Ailey; I’m so proud of the organization.”⁶⁴ Through the successions, the Ailey external affairs staff (development, marketing, and public relations) worked to maintain connections with and among patrons.

A deep connection between patrons and an organization is a cornerstone to successful fundraising and audience engagement. The organization strategically used successions for fundraising campaigns. When Battle became artistic director, the organization created a new membership program providing insider access through its Artistic Director’s Circle. A new donor program, the Parents Annual Fund, was developed to support The Ailey School’s programs, and (by extension) initiatives spearheaded by the School’s new co-directors.⁶⁵

Care

Luckman, reflecting on what she had seen across the field, shared “iconic leaders [as they near retirement age] may give up part of their jobs and responsibilities, but they [may be slow to] give up the authority and prestige of their roles.”⁶⁶ Legacy, obligation, and hubris may certainly be factors, but another reason these iconic leaders may be hesitant to step aside is, as Luckman reminds us “in the arts - people need the money, so they stay, perhaps longer than they should.”⁶⁷ Many arts organizations started in the mid-twentieth century did not plan for the retirement of leadership, leaving artistic founders without retirement savings. Luckman emphasized that the organization needed to *care* for its leaders in retirement.⁶⁸

Care as a guiding principle in succession planning is closely connected to organizational communication (internal to the organization and external to constituencies) as well as to operations. Emily Berger recalled “care was certainly there in terms of what we communicated, the way we communicated, involving both staff and our donors.”⁶⁹ Tiffany Batifort commented that the retiring leaders were “luminaires of the Ailey era;” she wondered if the “same level of

⁶⁰ Batifort.

⁶¹ Ibid.

⁶² Young.

⁶³ Anonymous patron phone interview.

⁶⁴ Anonymous patrons Zoom interview.

⁶⁵ For more information see <https://www.alvinailey.org/how-give>.

⁶⁶ Luckman.

⁶⁷ Ibid.

⁶⁸ The Ailey organization now offers retirement benefits to all of its full-time staff.

⁶⁹ Berger.

attention and care” would be given now that the organization was exiting that era, and if there would be as much attention and focus paid to people and processes under new leadership.⁷⁰

The concept of care also surfaced when discussing the onboarding of successors. Dacquiri Smittick Baptiste recognized that “taking over for Ms. Jamison had to be such a daunting task. Right away, I started empathizing with the person who would now have to assume the role, being third after the founder. How are we going to support this next person as a community?”⁷¹ Kristin Colvin Young acknowledged the challenges: “The right people had a hand in the ‘exit stage left.’ I think ‘enter stage right’ didn’t always go so smoothly . . .” She went on to urge intentionality in onboarding, from both the organizational perspective and that of the incoming new leader, explaining that successors will likely see “things that they deem they [can] fix and do better,” but that spending “time asking questions, talking to the people who have been there before” should be done before changes are made.⁷²

Celebration

Celebration - - the recognition of the contributions of the leader retiring from or leaving the organization - - was elemental to the Ailey organization's approach to succession. Parties were held to applaud the accomplishments of Jamison and Waters. Luckman's name now appears on a large plaque in the lobby. A memorial was held for Jefferson. Celebration as a guiding principle in succession is also tied to care, connection, and continuity: Celebration can demonstrate understanding of individual needs and wants, be an acknowledgement of a job well done, and it can tie an organization's future to its past. Looking back, we tended to celebrate those who were leaving the organization more than their successors. In hindsight, these celebrations may have (inadvertently) overshadowed the incoming leaders.

CODA

Given the importance of succession to the future of an organization, succession planning could be an opportunity to examine organizational needs - - current and future - - before assuming that a direct replacement of a particular role is warranted. An organization might seize the planning of a succession as an opportunity to consider a new leadership structure, for example, moving from a hierarchical structure to a lateral one, developing shared leadership practices, or re-defining a role or its specific responsibilities. Emily Berger asserted: “I don't think Ailey is unique in not having taken the opportunity for an organizational restructure [for these past successions]. Organizations tend to do a strategic plan to explore organizational restructuring [rather than using succession planning to do so].”⁷³ Luckman, who followed her career at Ailey with consulting, observed that many younger artistic directors now want more collaboration and are open to new organizational models.⁷⁴ In “Succession Planning 2.0,” Allen H. Church asserts: “We are all looking for that one special measurement tool, definition, chart format, program or practice that will suddenly simplify our processes and yet maximize our impact, transform our efforts and deliver the return on investment (ROI) and leadership bench for the future of the company. Unfortunately, no such silver bullet exists . . .”⁷⁵

⁷⁰ Batifort.

⁷¹ Baptiste.

⁷² Young.

⁷³ Berger.

⁷⁴ Luckman.

⁷⁵ Church 2014, 238.

Professional development opportunities for staff could be incorporated into a succession plan. Skills training, including leadership and management, finance, human resources, public speaking, could aid an organization in *building a bench* of possible successors for leadership roles. Dr. Carla Stalling Walter asserts "People in these key positions will need to be educated and developed for such purposes, even though such a need may never arise."⁷⁶ In her conversation with me, Melanie Person reflected that "professional development could benefit individuals and the whole organization."⁷⁷ Baptiste went further suggesting executive coaching for new leaders: "I don't care how long you've been in the industry, when you assume the role of successor you need an executive coach. You need an unbiased opinion talking to you about what you want and how to encourage you to be your best self in that new space."⁷⁸

At Ailey, mission, values, and intentionality were elemental to our work onstage and off. While it was our practice to hold post-mortems (debriefs) after most events and performance seasons, we did not do so for the successions. And, perhaps because we had not held organizational debriefs of these successions, each of those I interviewed seemed to appreciate the opportunity to reflect back on their experiences. Baptiste shared: "So many leaders are afraid of succession planning. But I think, taking on the mindset that you are only as good as the person who succeeds you is so important. How do we make sure that this institution can continue on? Because we're just here for a moment of time, and it must continue on."⁷⁹ Rizzo commented: "When an organization of this stature goes through such transitions so publicly, and does so in a structured and straightforward and transparent, and successful way it's good for the field."⁸⁰ Young mused "Mistakes will always be made. There will be many bumps along the way. But what is important is how you recover. . . . [from a misstep]."⁸¹ *Passing the mantle* is a choreography of succession that involves steps and missteps, an appropriate reminder from the Alvin Ailey American Dance Theater. And, 5, 6, 7, 8.

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⁷⁶ Walter 2015, 375.

⁷⁷ Person.

⁷⁸ Baptiste.

⁷⁹ Ibid.

⁸⁰ Rizzo.

⁸¹ Young.

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