

Building Resilient Leadership Structures Breakout



A Guide to Succession Planning for Continuity in Collective Impact

[Introduction & Purpose](#)

[Core Principles for Collective Impact Succession Planning](#)

[The Succession Planning Process](#)

[Best Practices & Pitfalls To Avoid](#)

[Conclusion](#)

Introduction & Purpose

Why is succession planning different in collective impact?

In traditional organizations, succession planning often focuses on a straightforward question: "Who will replace this leader?" In systems-level initiatives with a distributed staffing structure, this question doesn't quite fit the need. Leadership is not confined to a single individual; it is a dynamic process shared across a network of backbone staff, dedicated partners, steering committee members, and community leaders.

Knowledge is dispersed, critical relationships can span multiple organizations, and momentum depends on the collective capacity of the entire system.

This guide reframes succession planning for the unique context at the backbone and systems level. It moves beyond replacing individuals in hierarchical charts. It focuses instead on a more resilient and strategic goal of **ensuring the continuity of critical functions and relationships that make the collective work possible.**

This approach views transitions not as crises to be managed, but as **opportunities to strengthen the initiative's overall health, distribute leadership more intentionally, and build a truly adaptive and sustainable system for long-term social change.**

Core Principles for Collective Impact Succession Planning

Succession planning in a distributed network should be guided by a shift in mindset to be most effective. These 5 principles should inform your entire process:

PRINCIPLE	TRADITIONAL APPROACH	TAILORED APPROACH FOR CI
1. Focus on Functions, Not Positions	<i>Who will fill the Director's job if they resign tomorrow?</i>	<i>Which essential functions and relationships must continue seamlessly? (e.g., convening, data analysis, community trust-building)</i>
2. Assess Talent Across the Network	<i>Look for readily available talent internally on the backbone team.</i>	<i>Identify and cultivate potential talent within partner organizations, workgroups, and the community.</i>
3. Prioritize Knowledge Management Practices	<i>The departing staff member writes a handover memo or role guide.</i>	<i>Knowledge and critical operating procedures are systematically documented and shared in real-time through accessible, collective platforms (wikis, shared drives).</i>
4. Embrace Distributed Leadership	<i>Organizational leaders hold the power and authority.</i>	<i>Leadership is a function shared by many. The goal is to build redundancy and capacity at multiple levels.</i>
5. Make it a Living Process	<i>The succession plan is a static document, reviewed periodically for updates with each role.</i>	<i>The plan is a dynamic tool for strategic conversations, adapted regularly as the initiative and its people evolve.</i>

The Succession Planning Process

This process is designed to be collaborative and adaptable to the unique needs of your initiative.

Step 1: Convene Your Succession Planning Team

This is not a task for the backbone leader alone. Form a small, trusted team that reflects the distributed nature of your initiative.

- **Who You Might Include:** Backbone Leadership, Steering Committee Chair, 1-2 key partners who are deeply engaged, and perhaps a long-standing workgroup member
- **The Assignment:** This team will be responsible for guiding the succession planning initiative through Steps 2-7

Step 2: Identify Critical Functions and Key Relationships

This is the most critical step in your succession planning. Brainstorm and map the essential activities and connections that keep your initiative alive. Use the [Critical Functions & Relationship Mapping Worksheet](#) to guide this conversation.

- **When mapping Functions**, think beyond job descriptions. Examples might include:
 - Facilitating high-stakes community and partner meetings
 - Translating data into compelling stories
 - Managing grant reporting and funder relationships
 - Maintaining the initiative's communications channels (website, newsletter)
 - Onboarding new partners into the collective
- **When mapping Relationships**, identify the crucial human connections that sustain the initiative. Examples might include:
 - The trusted relationship with the mayor's office or local housing authority
 - The deep connection with a specific neighborhood or community group
 - The primary contact at a major funding institution

Step 3: Map Current Capacities and Assess Risks

For **each function and relationship that was identified in Step 2**, consider:

1. **Who holds this now?** (Name the person and their organization)
2. **Is this responsibility shared?** Or is it concentrated in one person?
3. **What is the risk of disruption** if this person transitions out of their role unexpectedly? Use the [Risk Assessment Matrix](#) to prioritize where to focus your talent development efforts. Begin by **mapping the Critical Functions & Relationships you identified in Step 2** to your matrix.

Step 4: Develop Talent and Distribute Responsibilities

For high-risk areas identified, **create intentional strategies to build capacity and redundancy**. This is the core of proactive succession planning and retaining institutional knowledge. Strategies to explore might include:

- **Supporting Mentorship:** Pair a current leader with an emerging leader from your network
- **Creating Shadowing Opportunities:** Have a potential successor "shadow" the person currently holding a key function, like facilitating a steering committee meeting or presenting to stakeholders
- **Facilitating Cross-Training:** Train multiple people on essential operational tasks

- **Shifting to Intentional Distribution:** Proactively shift a responsibility from one person to a small team or a different individual who has the capacity and interest to learn

Step 5: Create Clear Transition Protocols

Depending on the need, you should develop two types of plans:

- **Emergency Departure Plan:** A simple, one-page document outlining the most critical steps to take if a key leader departs unexpectedly. Consider questions like: Who is the interim point of contact? Where are passwords and critical documents located? Who communicates with partners?
- **Planned Transition Plan:** This is more detailed documentation for known departures that includes timelines for knowledge transfer, communication with stakeholders, and the process for transitioning functions. Use the [Talent Development & Transition Plan Template](#) to develop this.

Step 6: Document and Communicate the Plan

Store your succession documents in a secure but accessible location known to the full succession planning team. Communicate the *existence* of the plan and process (not necessarily all the details about individuals identified to own functions) to the broader steering committee or network to build confidence in the initiative's stability.

Step 7: Review and Adapt Regularly

A backbone initiative is dynamic. Review your plan **at least** annually (but preferably twice a year), and also when a major change occurs (e.g., a key partner changes their representative, a new grant is secured, or there are strategic focus shifts).

Best Practices & Pitfalls To Avoid

DO THIS 👍	AVOID THIS 👎
Start early. Make succession planning a normal part of your strategic conversations.	Wait until someone announces they are leaving.
Foster a culture where leadership is seen as a shared, collective responsibility.	Reinforce the idea of a single "hero leader" who is irreplaceable.
Invest time in building trust and strong relationships across the network.	Assume relationships will automatically transfer to a new person.

Document processes and decisions in shared, accessible spaces as a regular practice.

Rely on the memory of individuals to know how things work.

Conclusion

Succession planning in Collective Impact is more than risk management; it is a powerful strategy for building a more resilient, equitable, and leader-full movement. By focusing on functions, cultivating talent across the network, and embracing distributed leadership, you ensure that your initiative's vital work can endure and adapt through any transition, safeguarding the momentum you have collectively built.

For questions about information or resources shared in this guide, please contact Reagan Harvey at rharvey@community.solutions.