

Four Tips to Plan for a Successful Backbone Leadership Transition

The lifecycle of most backbones¹ will eventually involve the transition from a founder or long-standing executive director to new leadership responsible for stewarding the next phase of a place-based partnership's² work. These transitions frequently involve demographic shifts: from white people to people of color, from men to women and genderqueer people, and/or from older to younger leaders. While backbones usually think to prepare for the transfer of the more obvious aspects of operations (e.g., orienting new leaders to programs, sharing where important files and passwords are kept), several pieces, if not carefully considered, can undermine the best laid succession plans.



To effectively position backbones for future success, Nonprofit Finance Fund (NFF) recommends that leaders reflect on four key but frequently overlooked issues. Below we offer several questions for in- and outgoing leaders of backbones in transition to consider and discuss, both independently and together as peers.

1. DEFINE THE OUTGOING LEADER'S FUTURE ROLE

Founders and longstanding leaders often grapple with their legacy and the shifts in positional power leadership transitions can entail. The failure to fully unpack what a transition means for the outgoing leader – in terms of the impact on their identity, the tables they sit at, the respect they command in the community – can have ill effects. At best it muddies the transition process, and at worst it undercuts the work of the backbone and the incoming leader. Formally and explicitly defining the future role of the outgoing leader provides the opportunity to determine ways to maintain their valuable skill sets, knowledge, and relationships; to decide how leadership will be shared through the transition in an appropriate, mutually agreeable manner; and to ensure that new leaders have adequate space to implement desired change.

- **For the outgoing leader:** How do I envision myself remaining involved (if at all) in the work of the backbone? The place-based partnership? The broader community?
- **For the incoming leader:** In what ways does the outgoing leader's continued involvement align with my vision of the backbone's future work and needs? In what ways does it not?
- **For both:** If the outgoing leader remains involved, what agreements should we reach to ensure the arrangement works for both of us, the organization, its mission, and partners?

¹ **Backbones** – structures comprised of a single or multiple organizations that fulfill several core functions and facilitate action and accountability across place-based partnerships.

² **Place-based partnerships** – networks of people and organizations in the same geographic area who work together to change systems, improve community outcomes, and achieve shared goals.

2. ESTABLISH (AND STICK TO) A REASONABLE TRANSITION TIMELINE

Planning for a leadership transition should begin as early as is practical and include setting a date for the formal transfer of power. Sticking to a defined timeline not only helps to orient and steer succession planning, it also aids in mitigating ongoing uncertainty associated with more ambiguous deadlines (e.g., when the outgoing leader deems the incoming leader “ready”). A well thought-out timeline will allow ample room to implement an established succession plan (if applicable), and ideally to: 1) maintain operational continuity, 2) provide meaningful onboarding and offboarding (and if appropriate, overlap) for the incoming and outgoing leaders, 3) allow for the thoughtful announcement of news to staff, key partners, and funders and to respond to any questions or concerns, and 4) account for the additional capacity board, leadership, and staff will likely need to devote to the transition outside of the normal course of business. Generally, the formal shift in leadership should take effect no more than one year after public announcement of the transition, although internal work can start earlier.

- **For both:** Have we set a transition timeline that is mutually agreeable to in- and outgoing leadership and board, and factors in items 1-4 noted above?
- **For both:** What potential challenges or delays could arise that we should take into consideration in the transition timeline?

3. ARRANGE A WARM HANDOFF OF KEY RELATIONSHIPS

Particularly for founders, a backbone’s work may be intimately intertwined with their own identities and the close, personal relationships they hold with funders and partners. While an outgoing leader may facilitate an introduction between their successor and key stakeholders, these efforts can feel cursory and fall short of effectively building relationships. Backbones can avoid this by ensuring that the outgoing leader effectively “gives their seat at the table” to new leadership and inspires confidence among stakeholders by including their successor in important conversations with partners and funders and positioning them as a competent peer with the authority to steward the backbone’s future. This is especially important with funders and partners in a field to which a new leader has not historically had access.

- **For both:** What relationships need to be handed off to the new leader?
- **For the outgoing leader:** What actions can I take to ensure that I position the new leader as a competent peer?

4. ENLIST AN EXPERIENCED THIRD PARTY

The support of a consultant, board member/committee, or other neutral third party can be valuable in managing the transition and remaining accountable to the process accountable. Because leadership transitions among backbones frequently involve demographic changes, they can be fraught with power dynamics. Seeking out support from a third party with expertise helping organizations navigate issues of class, race, age, and/or gender can be immensely valuable in ensuring equity in the process.

- **For both:** In what ways would the support of a neutral third party be most useful to the transition process (e.g., advising, directly managing the process, etc.)?
- **For both:** Is the third party experienced at navigating dynamics of race, gender, age, etc. relevant to our situation?

ABOUT THE PROJECT

Nonprofit Finance Fund (NFF), with the support of **Ballmer Group** and in collaboration with **Community Solutions** and **StriveTogether**, embarked on a two-year project to understand how backbones of place-based partnerships operate and to gain insights into the factors that impact their sustainability and success in driving community-level outcomes. This project included analysis of data on over 80 place-based partnerships across the country, interviews with over 85 individuals from 30 of those partnerships, and in-depth consultation with 5 backbone organizations. This resource is part of a toolkit designed to support the work of practitioners within existing place-based partnerships, communities contemplating starting a place-based partnership, and funders that invest in these efforts. [Click here](#) for more information and to access the toolkit.

