

Successful Transitions: Succession Planning for Nonprofit Organizations

Deadline: 2/18/26

Effective nonprofit boards recognize that leadership changes are inevitable, whether it is an emergency or during a planned transition. These exceptional boards collaborate with the Executive Director to identify key strategies, information, and tools in advance in order to prepare for the executive's transition, whenever it may occur. At the same time, they work together to develop leadership throughout the organization.

Successful Transitions involves a cohort of 6-8 Lincoln nonprofit organizations that complete group virtual sessions, a customized session for each board, individual coaching, and peer support. Sessions are led by Ingrid Kirst, a nonprofit leadership consultant and certified succession planner. Each organization will complete an Executive Transition Policy, an Employee Continuity Plan, an Organization Inventory, and a Leadership Development Plan.

Four group in-person sessions will be held, all of which are highly interactive and feature robust discussions. The executive director and designated board member will attend all four sessions, each two and a half hours long.

Sessions will be held every other week beginning in mid-March 2026. The day and time will be set collectively by the participants.

Topics will include:

- **Establishing a Baseline** - an overview of succession planning, the discussions to have, and the documents to create.
- **Navigating the Conversations** - covering the theory of change & transition
- **Leadership Development Planning** - for developing leaders among board and staff
- **Executive Transition Management** - steps of a full transition and search process

"This is an excellent program/training. Please keep offering it." -2022 Cohort Participant

Requirements and Expectations of Participating Organizations

1. Each organization's executive director is required to participate in the sessions along with one board leader. Many organizations found that the chair-elect is the best person. The same board representative should attend all sessions.
2. Participants will receive assignments to be completed between each in-person session.
3. Each organization will establish a Succession Planning Committee that includes the two in-person attendees plus additional staff and board members. This committee will support the completion of assignments throughout the program.
4. Each organization will receive a facilitated board discussion on succession planning. Must be completed within three months after the course start date.
5. Organizations will also receive three one-on-one working sessions with Ingrid.
6. By the end of the program, organizations will be expected to create or update an Executive Transition Policy, an Employee Continuity Plan, an Organization Inventory, and a Leadership Development Plan. Participating organizations will be expected to complete their one-on-one sessions and succession plans no later than four months after the course start date.
7. Participants will provide a short report and evaluation to Cause Collective no later than four months after the course starts.
8. Each organization will pay \$250 to participate. This payment is due by the start of the first session to Cause Collective. (It's valued at over \$2500—local foundations cover the majority of the cost.)
9. Each organization must be a Cause Collective member in good standing.

Eligibility

Priority will be given to organizations that meet these criteria (but all are welcome to apply):

- Have a strategic plan that covers the current fiscal year.
- An executive director who is not leaving the organization within the next 12 months, but understands they will eventually leave the organization and wants to improve it now;
- Not currently engaged in significant organizational projects e.g. strategic planning or a capital campaign. Participation in the Successful Transitions Program requires a time investment.

"Very practical and thought-provoking." -2022 Cohort Participant

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Download or make a copy of the form to complete it.

Organization Name:			
Organization Leader:			Title:
Phone:		Email:	
Board Chair:		Phone:	Email:
Board Rep who will attend trainings (if not chair):		Phone:	Email:

Organization Overview Questions

Answers

How long has the executive director been leading the organization?	
Is the current executive director also the organization's founder?	
When did the board last review the executive director's job description and salary?	
How frequently does the board conduct a formal, written assessment of the executive director's performance?	
Does the organization have a written emergency succession plan?	
Is there a written succession plan (non-emergency) in place for the executive director's position?	
How frequently does the board review its own performance?	
When was the organization's current strategic plan developed?	
How many staff members does your organization have?	
What is your total projected revenue for the current fiscal year?	
What are your total projected expenses for the current fiscal year?	
How many board members do you currently have?	
Is the full board aware of this application to Successful Transitions?	

Please answer the following questions in one to two sentences.

How are your organization's human resources needs addressed in your current strategic plan? Please be specific.

Is the organization currently engaged or will be engaged during the program in strategic planning or other board-intensive projects? If yes, please explain.

Days of the week and times that don't work for you, or preferences on when we meet. I.e. not before 9:00 am, not on the 4th Tuesday mornings, etc. Please be as flexible as possible.

Use this space to provide any explanation of information provided in this application that needs further clarification.

Authorizing signatures:

Typing in your name acts as your official signature and certifies that you have personally reviewed this application and that the information presented is complete. This includes a commitment by the executive director and board representative to attend the four sessions.

Organization Leader:

Date:

Board Chair:

Date:

(a typed signature will suffice for both.)

[Learn more about Successful Transitions](#)

Please send your application to Jason Varga, Cause Collective Executive Director, at director@causecollectivelincoln.org and Ingrid Kirst, Successful Transitions Presenter at ingrid@ingridkirst.com.