

# COMMUNICATING A PLANNED CEO TRANSITION

According to *Leading with Intent: A National Index of Nonprofit Board Practices*, 50 percent of nonprofit CEOs/executive directors (chief executives) intend to leave their position within the next five years. Therefore, many boards and organizations will soon be grappling with a chief executive transition.

There are many elements of a chief executive transition — identifying transition leadership, planning the hiring and onboarding of a new chief executive, and running the organization during the transition. However, one of the most public ways an organization must manage a transition is through communications. In order for a transition to be successful, both internally and externally, good communication is paramount. It should provide assurances to the organization's staff and community served that the organization is operating effectively and prepared to move forward. Additionally, communication is essential in hiring the organization's next chief executive and can help ensure a smooth transition between the departing and incoming executives.

While there are many different types of chief executive transitions, this resource will discuss a planned departure — one in which the chief executive provides the board with ample notice of his or her plans to leave, allowing the organization to be strategic and intentional with its communications.

Planned executive transitions have four communication stages: pre-departure planning, departure announcement, progress communications, and new executive introduction. All stages require the departing executive, board, and/or transition committee to plan ahead and prepare a communications strategy.



When possible, the departing chief executive should be heavily involved in the communications surrounding the transition. However, if the transition is sudden or involuntary, the board must take the lead in communicating throughout the process, paying special attention to assuaging any concerns on the part of staff and external stakeholders.

## 1. PRE-DEPARTURE ANNOUNCEMENT PLANNING

It is the chief executive's responsibility to communicate with the board as soon as he or she is considering leaving the position. Ideally, the transition will first be discussed at a board meeting to ensure that everyone is informed and prepared before the organization moves forward with transition planning.



### **What's the difference between executive transitions and succession planning?**

Executive transitions are intermittent events that are timeline driven. They often begin with a precipitating event — the chief executive announcing his or her intentions to leave the organization or a more abrupt removal of the executive, for example — and wind down once a new executive has assumed the role and is oriented to the board and organization.

Succession planning, on the other hand, is an ongoing, continuous process that boards undertake to strengthen the foundation of the executive position. Succession planning creates the conditions for the incumbent chief executive to succeed, clarifies the organization's current and future strategy, and provides a sound infrastructure to prepare the organization whenever the search for the next chief executive begins.

Once the full board is informed, the planning can begin in earnest. The board can identify the individuals who will be most involved with the transition planning, perhaps creating a transition committee. This core group of individuals will then begin behind-the-scenes discussions to plan the transition and prepare the departure announcement.

Many of the key elements of a good transition communications plan can be developed before a transition has started. However, even with a strong succession plan in place, the board should review it and tailor elements to the specific executive transition the organization is undergoing.

The transition team should begin planning by discussing a few key questions:

- Who should be informed about the departure? What key audiences (donors, members of the organization, collaboration partners, etc.) should be contacted?
- How will the transition be framed? It is important to identify a clear message the organization wants to send regarding the transition and consider whether it needs to be customized for specific audiences.
- How will the departure be announced? Should select in-person meetings be scheduled?

Following their initial discussions, the board and chief executive can work together to develop the specific items inherent to effective transition communications.

### Communications plan

- Outline of key communications actions
- Audiences the organization needs to reach
- Who is responsible for which actions  
*Additionally, it is important to identify who is responsible to speak on behalf of the organization and clarify that information for staff.*
- Due dates for each action

### Supporting Materials

- Letter to key stakeholders, usually from the board chair, outlining the board's "formal" message surrounding the transition
- One-page set of talking points to ensure everyone involved in the communications process is on the same page regarding the transition
  - > Statement acknowledging departing executive's contributions to the organization
  - > Board's plans for managing the transition
  - > What's next for the departing executive
- Press release for key news outlets

### List of contacts for communications about the transition

- 📞 **Phone list** – short list of the organization's most important stakeholders. If the departure is happening on good terms, the departing executive should reach out to the stakeholders personally.
- ✉️ **Letter/Email list** – individuals who will receive a personal letter or email from the departing executive or appropriate board member
- 📰 **Newsletter list** – those who will learn of the transition through an organizational newsletter. Usually includes categories of individuals rather than specific names (e.g. community members, clients, etc.)
- 📺 **Media list** – media outlets that will receive the press release or personal phone calls from the organization's spokesperson

## 2. DEPARTURE ANNOUNCEMENT

The departure announcement is the most important aspect of a good transition communications plan. This is the time in which the organization's staff and key stakeholders are first made aware that the chief executive is leaving.

### **Staff**

Once the board and departing executive have finalized the departure announcement and begun planning the transition communications, the organization's staff should be informed. Staff members may understandably be uneasy about what is going to happen when the new executive arrives, so it is important to prepare key talking points about the transition and be prepared to answer any questions that may arise.

### **Key Stakeholders**

After the staff is informed, the organization must turn its attention to key stakeholders. The goal is to communicate with clarity and in a way that inspires confidence. For the initial conversations, the board does not need to have a detailed transition plan ready. Rather, it should be prepared to explain generally how the organization plans to handle the transition and provide a rough timetable.

The executive should work closely with the board before reaching out to his or her contacts to ensure he or she is not 'jumping the gun' and that everyone within the organization is on the same page about how the departure communications will be handled.

## 3. PROGRESS COMMUNICATIONS

Regular communications to staff and other key audiences throughout the process will keep them apprised of the transition's progress.

It is critical to keep the entire community up to date on the status of the transition process during the several months that it usually takes from the announced departure of the incumbent to the start date of the new chief executive. Consistent communications enable the board to stay on top of the transition and avoid gossip and uninformed speculation.

### **Announcements that should be made throughout the transition**

- ➔ Provide information about why the chief executive is departing. Also, include information and statistics about his or her term of service and highlight important accomplishments.
- ➔ Use the formation of the search committee to share the projected schedule for the transition.
- ➔ Encourage applicants by sharing the incoming chief executive profile once it is completed.
- ➔ Continue to keep the community informed about the status of the search.
- ➔ Formally announce the appointment of the new chief executive.
- ➔ Share relevant information about the new chief executive's participation in events, initiatives, and observations from the initial months in office.

## 4. NEW EXECUTIVE INTRODUCTION

Once the organization has selected a new chief executive, it is important to announce the hire with excitement and confidence. The communications should be designed to publicly welcome the new executive and introduce him or her to the organization and the community.

The board should consider the best way to inform staff and key stakeholders, presumably the two groups who have been most involved throughout the process. During the introduction, the board can highlight a few reasons it believes the incoming executive is the right choice for the organization and then allow the executive to introduce him or herself.

All external announcements should include a few basic materials in order to provide the public with more information about the organization's new chief executive.

### **Materials to be included in new executive introduction**

- Press release
- Biography of the new executive
- Letter to stakeholders
- Photo of the new executive for press

Contacts should be segmented in the same manner they were for the departure announcement — phone, letter/ email, newsletter, and media lists.

The announcement of a new chief executive is an opportunity to do more than simply tout the incoming leader's credentials. It is also a chance for the board to signal a new direction or vision for the organization, particularly for organizations that are making a significant pivot or change with a transition.