

4.7 Transition Communications Plan

It is the ED's responsibility to communicate with the board as soon as he or she is considering leaving the position. Ideally, a conversation would occur at a board meeting to ensure all directors are informed and prepared before the organization begins transition planning.

If possible, the departing ED should be heavily involved in the communication surrounding the transition. This will give key stakeholders assurance, and address any concerns they may have.

Once the full board is informed the transition planning can begin. The board may wish to appoint a committee or group of directors to plan for the transition and prepare the departure announcement.

1. Pre-departure Announcement Planning

The transition team should begin planning by answering the following questions:

- a. Who are the key audiences that need to be informed and contacted about the departure? (residents, society members, partners, members of the organization)
- b. How will the transition be framed? What is the message the organization wants to send regarding the transition and does this message require customization for specific audiences?
- c. How will the departure be announced? Do we want in-person meetings for some groups, a letter for others etc.?

Develop a Communications Plan that:

- Outlines key communications actions
- Audiences the organization needs to reach
- Timelines or due dates for the actions
- Who will be responsible to deliver

Develop Supporting Materials

- Board Chair should develop a letter to key stakeholders outlining the formal message surrounding the transition

ED Succession Plan Attachments & Supporting Documents

- Develop a one page document with “talking points” so everyone can be engaged in the communication process and stay on message. This should include:
 - o Statement acknowledging departing ED’s contributions to the organization
 - o Board’s plans for managing the transition
 - o What’s next for the departing ED
- Develop a Press Release for key news outlets if necessary. Work with organization’s Communications Specialist to include the key messages and talking points.

Develop List of Contacts

- Phone List: short list of NHA’s most important stakeholders that should be notified by phone. If the departure is on good terms then the ED should reach out personally.
- Letter/Email List: list of those that will receive the formal announcement from the board chair via email.
- Newsletter List: NHA produces a monthly newsletter for residents. The board may decide to use the newsletter as way to keep residents informed about the transition. The official announcement of ED’s departure should be sent directly to residents.

2. Departure Announcement

This is the most important aspect of the transition communication plan.

Informing Staff

- Staff should be informed once the board has finalized the departure announcement and begun the planning for the transition communications.
- Staff may be understandably uneasy about what is going to happen when the new ED arrives so it is important to prepare key talking points about the transition and be prepared to answer questions
- Regular and consistent communication with staff is key so as to avoid gossip or uninformed speculation

Informing Key Stakeholders

- Inform stakeholders after staff
- Communicate with clarity and confidence
- Be prepared to explain **generally** how the organization plans to handle the transition and the rough timetable
- Stick to the talking points

3. Progress Communications

Communicate regularly with staff and other key audiences throughout the process of finding a new ED.

Announcements that should be made throughout the transition:

- Provide information about why the current ED is leaving and include statistics about her term of service and highlight any accomplishments
- Share the anticipated timeline for the transition to new ED
- Keep the stakeholders informed about the status of the search
- Formally announce the appointment of the new ED
 - o Share information about the new ED's participation in various initiatives
 - o Highlight reasons why board believes the new ED is the right choice
 - o Provide bio and photo of the new ED
 - o Ensure that communications is segmented same as for the departure announcement
- Provide opportunities for the new Ed to introduce him/herself to the community and stakeholders