

**Communications Templates for Succession Planning**

**Links**

1. **Communicating a Planned CEO Transition**

BoardSource, 2017. Detailed guidance on a four-part communications plan for a planned executive transition.

<https://boardsource.org/wp-content/uploads/2017/05/Communicating-PlannedCEO-Transition.pdf?hsCtaTracking=49e2ae6d-e05d-47f0-9fc6-64c94eb2d9aa%7C3b1078e9-b109-44a2-bc6a-e56d761a457a>

1. **Emergency Succession-Planning Template**

See Emergency Succession-Planning Template, Step 3, p 25, which provides brief but specific guidance on things like the essential content of communications related to an emergency transition.

From the *Nonprofit Executive Succession-Planning Toolkit,* Federal Reserve Bank of Kansas City, Denver, Oklahoma City, and Omaha, undated <https://www.kansascityfed.org/Community/documents/82/nonprofit-resources-NONPROFIT-TOOLKIT.pdf>

**Sample Emergency Transition Communications Plan**

**Plan:**

* When an emergency situation involving the chief executive occurs, the Board Chair should be informed immediately. The Board Chair should review the emergency succession plan and immediately begin implementation.
* Board and staff should be informed immediately after the Chair, with the person identified for the Acting Director contacted first, to be sure that person is prepared for the role and aware of the responsibilities involved. Hopefully these are described in the Emergency Transition Plan.
* Within the first 24 hours after the emergency occurs, the Board Chair (with staff assistance) will send personalized emails or make telephone calls to key contacts (funders, allies and partners, etc. – see formats for contacts charts below), to inform them of the emergency and the organization’s response. Focus will be on informing them of the situation and reassuring them that the organization has the situation under control, providing the name and contact information for the Acting/Interim Director, and promising to keep them informed as the organization implements its emergency succession plan and makes longer-term plans.
* Within 48 or 72 hours, similar notification will be provided to the second list of stakeholder contacts, usually via email.
* The Acting Director should reach out to key funders and other stakeholders by telephone or email within the next week or so, and the Board Chair should send periodic updates on the situation.
* A typical initial announcement email from the Board Chair might look something like this, with appropriate refinement to fit the particular situation:

*El Centro Latino is extremely sorry to inform you that our Executive Director, Ms. Nelly Gomez, was seriously injured this morning in an automobile accident. She is being treated at Memorial Hospital, and it is our hope and expectation that she will return to the organization in the near future.*

*We greatly value or relationship with you, and wanted to be sure you were made aware of the situation immediately.*

*Deputy Director Javier Acosta has been appointed Acting Director during Ms. Gomez’s absence; please contact him in any situation for which you would normally reach out to Ms. Gomez. The management team and entire staff have stepped up to assist Mr. Acosta and ensure that normal operations continue without disruption, and the Board has established a special Interim Committee to support the staff. The Board adopted an emergency succession plan last year, and it is being implemented.*

 *If you have any concerns or questions, please contact Mr. Acosta at (phone and email) or me as Board Chair, at (phone and email). We will keep you informed about the situation.*

*We deeply appreciate your support.*

* As part of your emergency plan, you should have *separate lists* of First 24-Hour Contacts and First 48- or 72-Hour Contacts. These lists should be updated at least quarterly. Here is a sample format.

**Contact List for: \_\_\_ First 24 Hours \_\_ 48 or 72 Hours**

| **Key Stakeholders** **(Type and Name of Entity)** | **Name and Title of** **Contact Person** | **Phone Number and** **Email Address** |
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| 1. **Funders** *[In Priority Order]*
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| 1. **Key Allies/Partner Organizations**
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| 1. **Supportive Public Officials**
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| 1. **Other Key Stakeholders**
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* Depending on the organization, you will probably want to make an announcement to clients immediately, while reassuring them that services will continue without disruption.
* Once you have a better sense of the situation, the organization will probably want to issue a press release that summarizes what has happened and how the organization is responding. The focus should be on providing accurate information, and communicating how the situation is being addressed – in other words, being transparent while reassuring the community. The Board Chair should be quoted in the release and may need to be available for interviews. Send the release to key media outlets, use social media including your Facebook page, and post it on your website.
* The staff should receive regular briefings on the status of the chief executive, so they can rely on facts rather than rumors. Keeping them informed will also encourage a sense of unity and joint responsibility.
* If the situation changes, and it becomes clear the chief executive will be out a long time or will not return, the change should be communicated internally and externally. A change in temporary leadership structure, including the hiring of an Interim Director from outside the organization, should be communicated, with contact information and some biographical information about the Interim Director, as well as the organization’s long-term plans – whether that involves the eventual return of the chief executive or hiring of a new chief executive.
* The main point of communications throughout the process is to ensure that internal and external stakeholders have accurate information about the situation and understand that the situation is under control and the organization’s sustainability is not threatened.