

Executive Director Transition Plan Communications Checklist

Below is a plan for communicating the Executive Director's decision to leave the organization with timelines. The goal is to communicate with clarity and in a way that inspires confidence. Once the news is received by the board, subsequent communications to staff, members, funders, etc. need to be orchestrated promptly.

✓	Who	What	Date/Week of
	Executive Director	Initial conversation with Board President	
	BOD President/ED	Notify full board of directors (timing to be determined by board president)	
	BOD President or ED	Notify staff of departure during staff meeting	
	BOD President or ED	Notify key foundations via personalized emails. Follow up phone calls scheduled for more detailed conversations to share background of departure.	
	ED	Clearly define roles for communications with various audiences.	
	ED, Board, and Communications	Develop specific talking points for each audience.	
	Board, ED, Communications, and Key Staff	Notify other stakeholders: • Foundations: <i>personalized emails, phone calls from: _____</i> • Key Campaign partners: <i>phone calls, personalized emails from: _____</i> • Major Donors: <i>personalized emails, phone calls from: _____</i> • Partners: <i>phone calls, personalized emails from: _____</i> • Members and volunteers: <i>via e-alert, newsletter</i> • Government agency officials: <i>tailored message from: _____</i>	
	Communications	Announce the ED's departure in organization's electronic newsletter or e-alert.	
	Communications	Advocate for written article about outgoing ED in local newspaper or publication.	
	ED, Board and Communications	Send direct mail letter to members, volunteers, donors, etc. from departing ED and Board	
	Communications	Contact media with brief press release to raise organization's profile.	
	Communications	Update website and other outreach materials.	