Sample Transition Timeline – Retirement
These are some of the key components of the transition timeline; modify as appropriate.

2 Years Out

- Executive director to develop personal plan/timeline
- Personnel Committee or small Transition Committee to identify any costs/financial implications related to the transition and plan accordingly
  - Will there be a retirement package? If so, what will it include?
  - Will the board host any special retirement events?
  - Ballpark budget for the search process. Costs may include:
    - Search firm
    - Local/regional/national advertising
    - Candidate travel costs (if soliciting outside of the area)
    - Relocation costs
    - Overlap salary costs if there is overlap between outgoing and incoming executive director

- Executive Director initiates efforts to ensure that institutional knowledge is captured/shared
  - Create a process and procedures manual
  - Ensure the filing system is rational and organized
  - Cross-train staff and volunteers
  - Begin introducing staff and volunteers to key contacts

12-14 Months Out

- Organizational planning by the board
  - Where are we?
  - Where do we want to be?
  - What sorts of strengths/qualities do we need in a new executive director given our vision for the organization?

- Research search firms, if applicable
- Appoint Search Committee
10-12 Months Out

- Translate visioning/planning discussions into management requirements or executive director profile
  - Are there internal candidates that may expect to apply? Will the board consider internal candidates? If so, how will the board manage that process? Board should communicate its expectations with staff
- Establish a salary range
- Engage search firm, if applicable
- Search Committee outlines the interview process (more detailed information available through the ABA Division for Bar Services)
- Develop internal and external communications timeline
  - How will the Search Committee keep the officers, board, bar members and staff apprised of the search process?

6-8 Months Out

- Publicize position
- Actively seek candidates (encourage members/colleagues to identify)
- Interview/Vet candidates
  - Vet questions in advance or provide interviewers with a refresher to ensure questions comply with state and federal laws
- Check references
- Work with counsel to make offer, negotiate contract
- Once the contract is finalized, announce the appointment

New Executive Transition

- Executive Committee to work with the new executive director to establish periodic (e.g., quarterly) goals and to develop an orientation process
- Executive Committee should continue to meet regularly with the new executive director to provide guidance and ensure a smooth transition