

EXECUTIVE DIRECTOR SAMPLE TRANSITION PLAN

Month One

Focus on Management and Administrative Functions, Meeting with Staff and Board

- Individual Meetings with Staff Members
- Attend ACC HQ Trainings, Establish Office, and Assume Accounts
- Meetings with Board
- Introduction to Bookkeeper
- Revise Survey and Create Plan
- Begin to Plan Welcome Events to Introduce New Executive Director to Leaders, Members, Sponsors, Etc.

	Events	Topics and Action Items
Week 1	Weekly Staff Call Call with Predecessor Individual Meetings with Staff Members Individual Meetings with President, Immediate Past President, and President-Elect Attend Chapter Events ACC HQ Trainings	Build Out Transition Plan Additional announcements <ul style="list-style-type: none"> • Press release • Message from New E.D. More Detailed Info re Staffing <ul style="list-style-type: none"> • Currently • History • Lessons Learned in Changes • Ideas & Needs <ul style="list-style-type: none"> ○ Potential Consultants Tech Tools and Solutions: <ul style="list-style-type: none"> • Email • Phone • Website • Cvent • Basecamp • Other software tools • Ideas & Needs Administration (e.g., workplans, files and records keeping, vendors) <ul style="list-style-type: none"> • Order business cards Review Duties with ACC HQ (e.g., annual report) Coordination with Board President <ul style="list-style-type: none"> • Bi-weekly calls • Other?

	Events	Topics and Action Items
Week 2	Attend Chapter Events Meetings with Other Officers and Leaders Trip to Banks for Accounts Introduction to Bookkeeper	Budget & Finance: <ul style="list-style-type: none"> • review by line item • process for developing budget • processes with bookkeeper • reports to Treasurer • tax filings • potential pitfalls Legal Matters: <ul style="list-style-type: none"> • articles and bylaws • policies • annual reports filed with the states • active contracts Communications Overview: <ul style="list-style-type: none"> • Monday round-ups • Friday e-newsletter • Monthly mailer • Annual Membership Directory • Social media • History • Ideas & Needs • Submissions to ACC HQ • Print Materials re Chapter
Week 3	Attend Chapter Events Meetings with Other Officers and Leaders	Executive Committee and Board of Directors: <ul style="list-style-type: none"> • Current goals • Quarterly board meetings • Annual planning retreat • Communications • Nominating Committee and Elections Volunteer Structure Generally: <ul style="list-style-type: none"> • History • Regional/Geographic Representation • Forums • Interest Groups • Initiatives • Ideas & Needs

	Events	Topics and Action Items
		<ul style="list-style-type: none"> ○ Engage Young Members? Forums: <ul style="list-style-type: none"> ● General History ● Employment & Labor ● Non-profits and Associations ● Litigation ● Global Issues ● Tech & IP ● Corporate ● Gov't Contracting ● Privacy & Data Security Issues ● Ideas & Needs Survey and Potential Events <ul style="list-style-type: none"> ● Focus of Events ● Timing of Report
Week 4	Attend Chapter Events Meetings with Other Officers and Leaders	Sponsors <ul style="list-style-type: none"> ● Solicitation and selection ● Notifications and invoices ● Communications ● ROI event ● Appreciation reception and breakfast ● Criteria ● History ● Ideas & Needs Survey and Potential Events

Month Two

Focus on Volunteer Leaders and Sponsors

	Events	Topics and Action Items
Week 5	Attend Chapter Events Meetings with Volunteers Leaders Meetings with Top Sponsors	Review and Revise Transition Plan Membership Efforts Programming and Events <ul style="list-style-type: none"> ● CLE Events <ul style="list-style-type: none"> ○ Development ○ Schedule ○ Timing of Release

	Events	Topics and Action Items
		<ul style="list-style-type: none"> ○ Bi-weekly calls with VP of Programming ● Signature Events ● Corporate Counsel Awards <ul style="list-style-type: none"> ○ Nominating ○ Judging ○ Event management ○ Publicity ● Social Events <ul style="list-style-type: none"> ○ Spring ○ Women's events ● History ● Ideas & Needs <p>Survey and Potential Events</p>
Week 6	Attend Chapter Events Meetings with Volunteers Leaders Meetings with Next Tier Sponsors	<p>Interest Groups</p> <ul style="list-style-type: none"> ● Small Law <p>Chapter Initiatives:</p> <ul style="list-style-type: none"> ● CLO Engagement <ul style="list-style-type: none"> ○ Leaders ○ CLO Breakfast ○ ACC HQ ○ eGroup ● Diversity & Inclusion <p>Survey and Potential Events</p>
Week 7	Attend Chapter Events Meetings with Volunteers Leaders Meetings with Third Tier Sponsors	<p>Chapter Initiatives:</p> <ul style="list-style-type: none"> ● Leadership Academy ● Corporate Scholars Program ● Diversity ● Law School Outreach <p>Survey and Potential Events</p>
Week 8	Attend Chapter Events Meetings with Volunteers Leaders Meetings with Fourth Tier Sponsors	<p>Chapter Initiatives:</p> <ul style="list-style-type: none"> ● Advocacy ● Public Relations & Communications Initiative ● Membership <p>Survey and Potential Events</p>

Month Three

Focus on Members, Vendors, and Partners

	Events	Topics and Action Items
Week 9	Attend Chapter Events Attend Membership Introduction Events Meet with Pro Bono and Community Service Partners	Chapter Initiatives: <ul style="list-style-type: none"> • Pro Bono & Community Service <ul style="list-style-type: none"> ○ Initiatives ○ Activities ○ Leaders ○ Partners ○ ACC Foundation Launch Survey
Week 10	Attend Chapter Events Attend Membership Introduction Events Meet with Pro Bono and Community Service Partners	Career Development Forum <ul style="list-style-type: none"> • Chairs (committee?) • Clearinghouse eGroup • LinkedIn • Tips • Professional Growth Partners <ul style="list-style-type: none"> ○ Financial aspect? • History • Ideas & Needs • Events? Information needed for upcoming events: <ul style="list-style-type: none"> • Board Meeting • Other Events (see above)
Week 11	Attend Chapter Events Attend Membership Introduction Events Meet with Key Vendors	Challenges of Geography <ul style="list-style-type: none"> • History • Ideas & Needs • Relationship to Other Chapters
Week 12	Attend Chapter Events Attend Membership Introduction Events Meet with Other Partners and Vendors	Review Plan and Cover Anything Missed