Transition Team Timeline

August 2006; Nov. 2006; Mar. 2007

May– Aug. 2006	Sept.– Dec. 2006	Jan. - Feb 2007	Mar - May 2007	Jun - July 2007

Joint Task Force Exploring – Prelim. Tests of feasibility

- Opportunities & Why; constituent assessment
- Due Diligence Requirements
- Communications Planning
- Transition Team Convened

Planning toward Implementation:

- Due Diligence
- **Prelim. Implement Communications (support of key stakeholders thru 7/07)**
- **Transit. Team id issues & develop action plan recommendations.**

Implementing Ph 1:

Boards act on Comprehensive Plan as a Recommendation of Joint Task Force

2008 Priority Planning begins (Needs Assessment, Impact; Id. StrategicOppty's for leadership, RD, Vol Leadershp)

New By-Laws –by 4/15 BoD Recruit – by 4/20

Legal Work – POM - By 4/15
By-Laws; id struct./gov changes;990s 3 yrs; IRS determ. ltrs, endow$ & restricted funds; surviving entity; Member ok,

BoD- Act on POM by 4/25

HR: Personnel Policies, Benefit Plans,

Backroom Integration/reconciliations

Bring Recommend. to membership –Spring 5/3

File w/ NYS 5/7-11

Implementing Ph 2:
New United Way

Strategic Planning for New Organization

RD strategies, tactics for 07-08; function/structure

"Community Impact Councils" - id vols

Facilities re-model