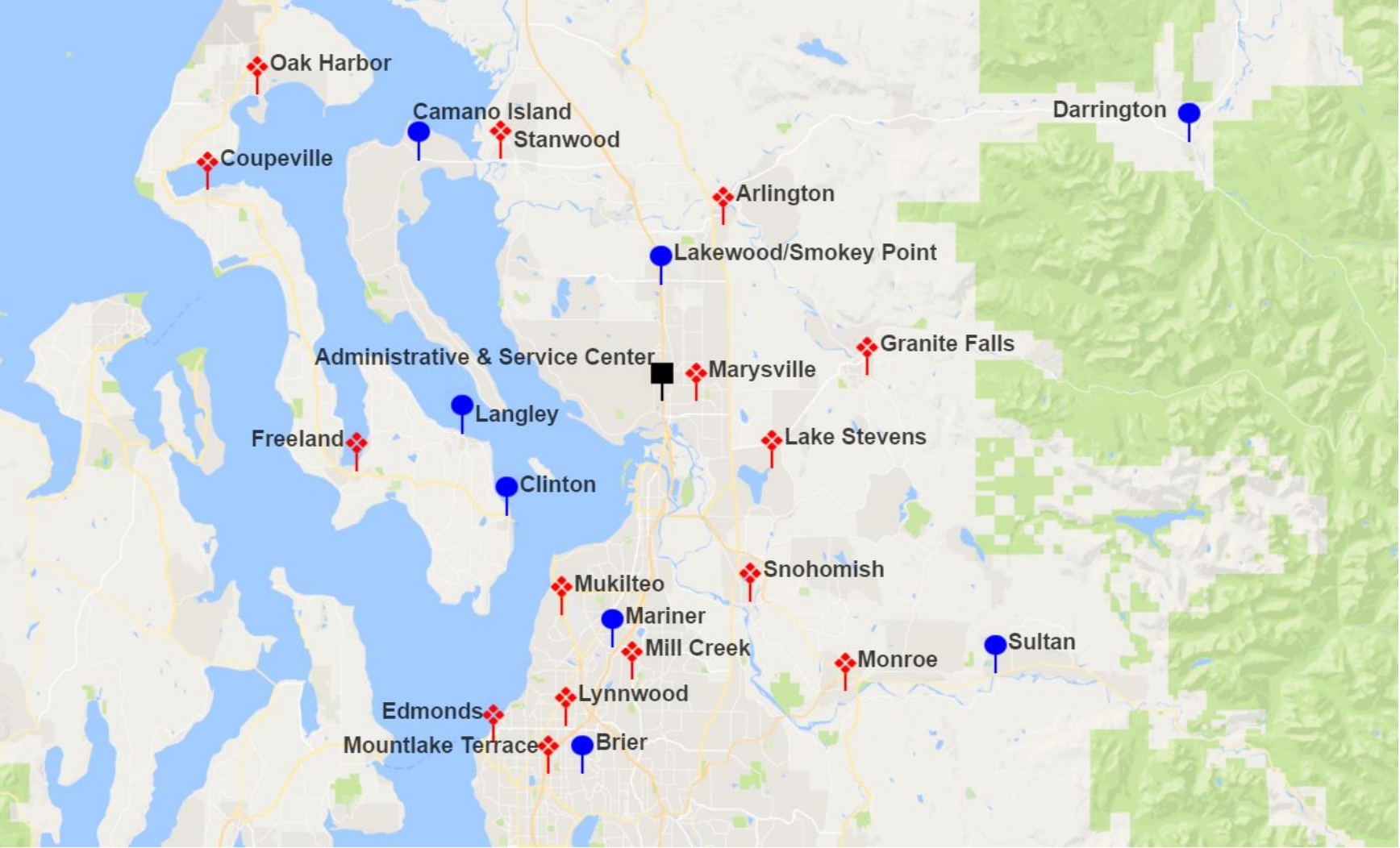


No Secrets!

PREPARING YOUR ORGANIZATION FOR YOUR
RETIREMENT

TERRY BECK, INFORMATION SERVICES MANAGER (RET)





Where do you want to be in 5 years?





Take a deep breath.



This is not about

- 401K, 457b, or financial planning for retirement
- Medicare or health insurance
- Figuring out the date that works best for you
- Navigating the Social Security System's website or your state/local retirement system's website
- Any personal, family concerns about retirement.

Why did I do this?

History

Goal-setting

Confidence

This takes time

Legacy

Some examples to consider

The sneak

The with-holder

The avenger

The subtle messenger

The threateners

The Process

Honest and open communication

Letting go/Giving up

Mentoring

Coaching

Celebrating

Honest and Open Communication

Tell your supervisor and ask for support

Allow time!

Don't announce it to the world—no blast emails!

Work it into your conversations

Be ready for questions

Creating a timeline

Begin with the end in sight

Set achievable goals

Use milestones

Ask for help

Do some risk analysis

Making the List

Daily

Weekly

Monthly

Annually

Whimsically





The clean-up



Letting go/Giving up

Unique responsibilities

Create your support system

Let things be different

Put it in action

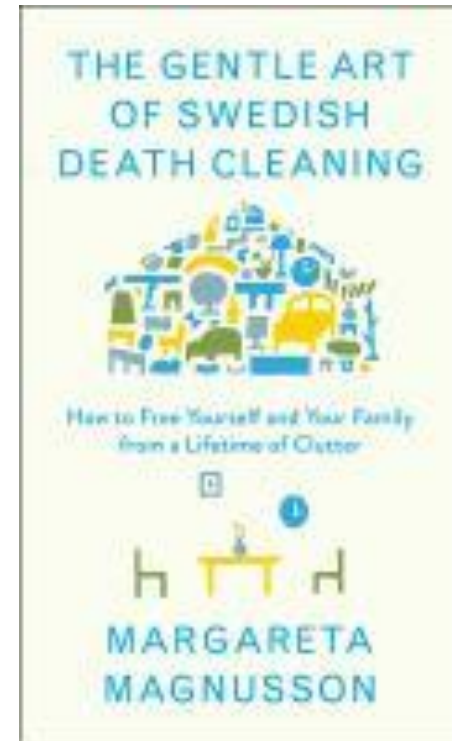
Cut the cords

Be there for the new people

Praise their work

Leaving things in order

First Friday clean out and filing
Leave files in order, well-named/labeled
And that includes electronic files!



The Turnover

Calendar

Who needs to know?

What do they need to know?

Files, logins, etc.

Mentoring

Lead by example

Listen

Praise the positive

Honesty above all

If you're not ready when I retire, then I haven't done my job!

Coaching

Teach someone to be politically savvy about your organization

Always ask—who else needs to know this? Who else can help?

Learn from mistakes and from successes

Be willing to say “I don’t know” because you can try to find out

It’s not about you

Getting support

Elevator speech

Stress the positive

Succession planning

Elevator Speech

Timing

Keep it brief

I won't be here forever, so you should know...

I shouldn't be the only one who knows this...

Let me show you/send you...

Who's the best person to take this over?

My elevator speech—one of many!

Different occasions

Different audiences

Some shorter than others

Always with a smile!

Accentuate the positive

Opportunity to evaluate your job description

Opportunity to evaluate your department

2000 to 2018—what's changed?

Succession Planning

You might not be selecting your successor

Don't groom anyone unless you are certain you'll control that process



Your turn

What is the one thing that you do for (or to) your organization that no one else does?

What is your biggest daily/weekly/monthly/annual headache for which only YOU know the solution?

What can you/should you stop doing or let go?

Who can you turn to in your organization to help you accomplish this?

Celebrating

It's personal

They're prepared

You're prepared


One last thing before I go...

Cut the cord, at least for a while



The smallest number will make you happy!

www.timeanddate.com

Start Date
Month: / Day: / Year: Date: 
[Today](#)

Include end date in calculation (1 day is added)

Days in Results:

Holidays for United States – Nationwide. [Change Country](#) / [Change State](#)

[Date to Date Calculator](#) [Add time fields](#)

180 work days left
-13 vacation days
taken

167 work days left

From and including: **Thursday, March 22, 2018** 260 calendar days – 80 days skipped:
Result: 180 days



Big Dates for Terry

❖ December 7, 2018

○ **Last day in the office**

❖ January 4, 2019

○ **Separation from Sno-Isle**

❖ February 2, 2019

○ **1st day of retirement!**

2020 Update

- New Executive Director
- Substantial Reorganization
- Job shifts
- COVID 19 Pandemic
- The work goes on



I can be reached at

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- email: terrylibrarian@Comcast.net

Questions, Answers, Comments



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