



## President-Elect Responsibility Timeline

### APRIL:

- Attend CBS/PE Bootcamp and overview of role
- Prior to retreats ensure you are transitioning your current role to incoming team member
- Attend retreat (April through June depending on chapter)

### JUNE

- Meet with your incoming Office of the President to review ways they can ensure they include you in decisions and conversations for training throughout the year
- Add all chapter specific items into your timeline to have a complete calendar

### JULY & AUGUST:

- Determine which areas of the Board and chapter business are your weakest points. Consider a plan to visit those various committees to learn more and train in key areas throughout the year.
- First Quarterly call with CBM, recommended agenda items to include:
  - Focus for the Year Ahead – “Office of the President” Culture
  - Responsibilities for Retreat Planning (***See Retreat Checklist Document***)
  - Committee Involvement – Training in areas needed throughout the year
  - Responsibilities for Succession Planning – Review and know your chapter’s succession plan prior to attending CBS

### SEPTEMBER:

- Review and become familiar with Chapter Leader Resource Page (CLRP)/Office of the President section
- Engaging with Nominations Committee which should be already approved by the board per polices and beginning the process of selecting the new board

### OCTOBER:

- Second Quarterly Call with CBM, recommended agenda items to include:
  - Succession and Transition Plan – Working with and supporting nominations process
  - Challenges and Concerns
  - Continue Committee Involvement – Visiting committees you are not familiar with
  - Identify your role for mid-year retreat – Emphasis on succession/transition planning
  - Engaging with the Board for one-on-ones
- Format and send Annual Retreat RFP

### MID NOVEMBER – MID JANUARY:

- Mid-Year Retreats take place
  - Agenda should allow time for you to cover the transition process coming in a few months. What are your expectations of the current team, processes, responsibilities
- Board one-on-ones take place to connect with current board members about succession



- Nomination process is on-going. Preparing to have slate for Board to vote at January board meeting at the latest. Review with IPP the toolkit and who will handle what items
- Begin process of interviewing and securing Annual Retreat Facilitator. **NOTE:** Include your CBM in this process; per policies your CBM must approve your facilitator

#### **JANUARY:**

- Familiarize yourself with your current Chapter Administrator's Agreement. Set up a meeting with your President to discuss Administrator's Annual Review (*based on contract renewal date*)
- Participate with President in Administrator's Annual Review (based on due date)
- Ensure you are compliant with policies regarding paid staff
- Review and become familiar with Chapter Bylaws, Policies & Procedures, and Roberts Rules of Order (***See Roberts Rules of Order at a Glance***)
- Meet with Chapter Administrator for an "Expectations Conversation"
- Board slate presented to board for approval per policies and prepared to send to membership for vote. (Chair of Nominating committee is ultimately responsible; be involved to learn and ensure processes are done according to policies)

#### **FEBRUARY:**

- Third Quarterly Call with CBM, recommended agenda items to include:
  - Retreat Review
  - Transition Meetings
  - Stepping Up to the Plate
- Finalize Annual Retreat dates, location and Facilitator with CBM (communicate to new board candidates the **IMPORTANCE** of their attendance during the interview process)
- Work with Facilitator on Annual Retreat Agenda (***See Retreat Checklist Document***)
- Finalize Facilitator Annual Retreat Agreement (***See Facilitator Contract Document***)
- Begin working with current President and IPP on a transition plans. **NOTE:** Transition plans and on-boarding should take place April - May
- Plan which board meeting & educational program **YOU** will run before the end of the term

#### **MARCH:**

- Slate due to CBM/MPI Global – March 1<sup>st</sup>
- Continue Retreat Facilitator Agenda calls
- Finalize initial retreat agenda
- Send welcome to new incoming Board members and encourage them to attend board meetings, Board 101 training (mandatory), CBS and retreat dates
- Welcome from CBM to new Board members
- New incoming Board gains access to CLRP – Training should happen in transitions or orientations
- Provide CBM with a list of Board members attending CBS



**APRIL:**

- Board Attends CBS (Chapter Business Summit)
- Ensure your incoming team members attend appropriate bootcamps
- Begin Board Member Transition Process (*See Transition Manual Document*)
- Retreats begin (April 15 – June 30th)

**MAY:**

- Retreats continue
- Work on Business Plans, Budget, Chapter Operations Form, Administrator Agreements, New Member On-Boarding and Written Succession Process (all due to your CBM/ MPI Global by June 15<sup>th</sup>; reference Policies for updated list of compliance)
- Establish MPI Foundation Liaison (*in many cases this is the President-Elect*)
- Review Metrics and Performance Standards with your CBM (\*Note: All metric goals are chapter driven with the exception of the satisfaction goal)

**JUNE:**

- All documentation to CBM / MPI Global to include the following:
  - Chapter Business Plan – includes membership strategy
  - Education Calendar
  - Budget
  - Copy of Administrator Agreement
  - Chapter Operations Form (CLRP)
  - Written Succession Process (may be part of your policy manual)
  - Dashboard Template (provided by Global monthly completed by chapter)
  - Updated Bylaws as well as Policies & Procedures

**NOTE: FOR RESOURCES AVAILABLE TO PRESIDENTS ELECT, [click here](#)**