[MPI Chapter Logo}

**Board Orientation\*  
[Location]  
[Date]**

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| --- | --- | --- | --- |
| **Time** | **Segment** | **Leader** | **Audience** |
| 8:00 AM | **Welcome and Introductions**   * Name, Role, Day job | OOP | New Board Members |
| 8:05 AM | **Board 101 Webinar** | OOP | New Board Members |
| 9:05 AM | **Board 101 – Chapter Specific**   * Expectations of board members * Attendance – meetings, events, retreats * Communication * Decision-making * Succession planning/recruitment * Chapter Functioning * Bylaws * Policies and Procedures * Robert’s Rules of Order * Core Documents incl. Board Reports | OOP | New Board Members |
| 9:30 AM | **Chapter Administrator Overview**   * Role of Chapter Administrator * Expectations * Processes (Check requests, etc.) | Chapter Administrator | New Board Members |
| 9:40 AM | **Break for Returning Board Members to Arrive** |  |  |
| 9:45 AM | **Introductions**   * Name, Role, Day Job | President | Entire Board |
| 9:50 AM | **Icebreaker** | Entire Board | Entire Board |
| 10:00 AM | **MPI Global Overview**   * Role of Chapter Operations Manager * MPI Global mission * Chapter Leader Resource Page * Chapter Leader Trainings * WEC and CBS * Global Standards/Dashboard | President  Chapter Operations Manager | Entire Board |
| 10:45 AM | **MPI Global Board Role Training**   * MPI Global Role-Specific Training Webinars | Entire Board | Entire Board |
| 11:45 AM | **Core Documents Overview**   * Business Plan * Budget * 24-month Calendar * Communications Calendar | President  VP of Finance  Chapter Administrator |  |
| 12:15 PM | **Preparation for CBS and Annual Retreat**   * Where, what to bring, attire, what to expect, who the facilitator will be | President | Entire Board |
| 12:20 PM | **Final Remarks/Parking Lot**   * Sign forms (Conflict of Interest, etc.) | OOP |  |
| 12:30 PM | **Conclude** | Entire Board |  |

* \*Goal is to host Board Orientation in March
* \*Feel free to customize based on applicable board roles and time constraints
* \*First segment just new board members, then all seasoned board members join in for refresh/bonding
* \*Allows new board members to become familiar with terms and tools prior to CBS and the Annual Retreat
* \*Highly recommended to watch the MPI Global role-specific training webinars while meeting in person to ensure it gets done. Board members would need headphones or breakout space so each can watch their specific webinar.