[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
 | PresidentChapter 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
 | PresidentVP of FinanceChapter 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.