



# Office of the President – 12-month Timeline

Welcome to the Office of the President! Congratulations on ascending to the top volunteer role in your local Meeting Professionals International Chapter. As a member of this collective body, you play a vital role in Chapter oversight, volunteer engagement and member care.

This document provides a month-by-month timeline for each of the three positions. Use it as a guide throughout the year to perform your duties and grow into your next phase of leadership.

Each position has an over-arching focus throughout the year:

<b>President Elect</b>	<b>President</b>	<b>Immediate Past President</b>
<ul style="list-style-type: none"> <li><input type="checkbox"/> Shadow the president throughout the year to set yourself up for success.</li> <li><input type="checkbox"/> Plan the mid-year retreat in concert with the president.</li> <li><input type="checkbox"/> Review and become familiar with Chapter Bylaws, Chapter Policy Manual, and Roberts Rules of Order.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Mentor the president elect.</li> <li><input type="checkbox"/> Include the president elect in all communications with the Board.</li> <li><input type="checkbox"/> Develop Board members to prepare them for their current and future volunteer roles.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Mentor the president.</li> <li><input type="checkbox"/> Support the Office of President with governance at Board meetings.</li> <li><input type="checkbox"/> Ensure the Board stays compliant with the Chapter Bylaws and Chapter Policy Manual.</li> <li><input type="checkbox"/> Manage the nominations process as Chair of the Governance and Nominating Committee.</li> </ul>



July

July

July

## Key focus and objectives this month:

- Understand your role and set tone for accountability.
- Drive metrics and business goals.
- Keep board members solution focused.
- Instill and practice strong board meeting practices.
- Bylaws/Policy Manual – make sure full board has a copy. Make sure they are referenced and kept current.
- Encourage Governance and Nominating Committee to attend Succession Planning training.

### President Elect

- Determine which areas of the Board and chapter business are your weakest points. Consider a plan to visit those committees to learn more and train in key areas throughout the year.
- Review your chapter's succession plan prior to nominations processes and mid-year retreat.

### President

- Ensure all dashboard entries for previous month completed by deadline.
- Work with IPP to appoint Governance and Nominating Committee and seek Board approval by end of August.
- Begin tax preparation.
- Update bank signature cards.
- Ensure all annual filings for state/local requirements have been completed.
- Meet with Office of the President and Administrator to review and update Chapter Policy Manual.
- Set expectations with your paid administrator (if applicable).
- Begin submitting monthly board packets to COM: agenda, minutes of previous meeting, board reports, motions to be introduced, previous month's financials, updated business plan, education calendar, balance sheet and monthly profit and loss report.
- Chapter Demographic Report has been refreshed. Review with Board members.

### Immediate Past President

- Meet with new PE to review the current nominations process.
- Meet with Office of the President and Administrator to review and update Chapter Policy Manual.
- Initiate discussion about whether new committees or Board roles are required to support initiatives.
- Engage with your Chapter's Past Presidents Council (if applicable).
- Share International Volunteer Committee and Board opportunities with Past Presidents  
<https://www.mpi.org/membership/global-volunteer-center>.

August

August

August

## Key focus and objectives this month:

- Understand your role and set tone for accountability.
- Drive metrics and business goals.
- Keep board members solution focused.
- Instill and practice strong board meeting practices.
- Review branding/logo to ensure compliance.
- Bylaws/Policy Manual – make sure full board has a copy. Make sure they are referenced and kept current.
- Encourage Governance and Nominating Committee to attend Succession Planning training.

### President Elect

- Continue to visit Board committees to learn and train in key areas throughout the year.
- Become familiar with Office of the President culture.
- Review your Chapter's succession plan prior to nominations processes and mid-year retreat.

### President

- Finalize mid-year retreat agenda and communicate details to Board (optional). Allow time for PE to present transition training and expectations.
- Work with IPP to appoint Governance and Nominating Committee and seek Board approval by end of August.
- Chapter year-end results are being calculated for awards and performance assessment.
- COM will set up a call for your annual performance review.
- Applications due for MPI International Committees and Boards.

### Immediate Past President

- Finalize decisions about whether new committees or Board roles are required to support initiatives (requires Board approval).
- Share International Volunteer Committee and Board opportunities with membership. <https://www.mpi.org/membership/global-volunteer-center>.



September

September

September

### Key focus and objectives this month:

- Supporting success and keeping teams focused on goals and engagement.
- Encourage and keep teams rallied for success.
- Support challenges with team members and offer guidance to address leadership issues.
- Gather support/training ideas for leaders that can be implemented.

### President Elect

- Begin engaging with Governance and Nominating Committee once approved by the board. Remember that you do not have a vote in the Committee’s decisions, however, you do have input.

### President

- Finalize mid-year retreat details and ensure Board is attending.
- Recommended quarterly departmental touch-base calls or meetings.
- Chapter performance assessment calls with COM – Review as Office of President and Administrator. Once complete, share with Board at next board meeting or retreat.
- Recognize and thank volunteers.

### Immediate Past President

- Officially welcome Governance and Nominating Committee with expectation of plan for year. Include dissemination of nominations policies and timeline.
- Review and revise Board application process as necessary
- Invite Governance and Nominating Committee to attend succession & nominations training provided by Global.
- Announce the makeup of the Governance and Nominating Committee and the upcoming Nominations process via Chapter communications.
- Encourage members to apply to serve on an International Volunteer Committee or Board (CMAC, IBOD, etc. – term begins January 1).



### Key focus and objectives this month:

- Retreats are getting organized with strong agendas and facilitators.
- Supporting success and keeping teams focused on goals and engagement.
- Encourage and keep teams rallied for success.
- Support challenges with team members and offer guidance on how to address leadership issues.

### President Elect

- Mid-year retreats (optional) Oct-Jan. Agenda should cover upcoming transition. Define your expectations of the current team, processes, and responsibilities.
- Succession and transition plan – Work with and support nominations process.
- Continue committee involvement – visiting committees you are not familiar with.
- Identify your role for mid-year retreat – transition planning and onboarding new BOD.
- Format and send annual retreat RFP (for April – June).

### President

- Mid-year retreats (optional) Oct-Jan.
- Continue mid-year retreat agenda calls with Facilitator & COM.
- Create an environment that is welcoming of succession.
- Accountability - are you touching base with teams?
- Taxes and year-end financials.
- Review succession plan with Board (standing agenda item at Board Meetings moving forward).
- Ensure you are compliant with succession policies and entire Board is familiar.
- Submit metric incentive claim form to Global.

### Immediate Past President

- Mid-year retreats (optional) Oct-Jan.
- Prepare official invite for Board applications to be sent in November (see your chapter succession policy and timeline, full process to be complete by end of January).
- Finalize Board application process.
- Ensure previous fiscal year awards are communicated to Chapter members (if applicable) and VP communications utilizes current graphics and banners.
- Review opportunities for RISE award nominations/application with the Board.
- Encourage members to apply to serve on an International Volunteer Committee or Board (CMAC, IBOD, etc. – term begins January 1).



November

December

### Key Focus and objectives this month:

- Provide guidance and support in areas of concern.
- Keeping team on track and providing resources.
- Ensuring solid Board is selected for new term.
- Be a cheerleader, keep them motivated!
- Face to Face engagement with leaders.

### President Elect

- Mid-year retreats (optional) Oct-Jan.
- Board orientation - work with your Administrator on this process.
- Board one-on-ones to connect with current board members about succession.
- Attend training with Governance and Nominating Committee.
- Begin annual retreat planning to be held April-June. Explore dates and venue. Begin interviewing and securing annual retreat facilitator (must be an MPI Verified Facilitator).

### President

- Mid-year retreat (optional) Oct-Jan.
- Dec 5 - INTERNATIONAL VOLUNTEER DAY – recognize and thank Chapter volunteers.

### Immediate Past President

- Mid-year retreat (optional) Oct-Jan.
- Support PE with transition planning.
- Present any updated Chapter Bylaws/Policy Manual for Board approval if not already completed.
- Work with Governance and Nominating Committee to review candidate applications, conduct interviews, and select new Board slate.
- Review opportunities for RISE award nominations with the Board. Submit nominations/application (if applicable).



### Key Focus and objectives this month:

- Provide guidance and support in areas of concern.
- Keeping team on track and providing resources.
- Ensuring solid Boards are selected for new term.
- Be a cheerleader, keep them motivated!
- Face-to-Face engagement with leaders.

### President Elect

- Mid-year retreat (optional) Oct-Jan.
- Finalize annual retreat dates, location, and facilitator with COM. Finalize facilitator agreement.
- Familiarize yourself with current Chapter administrator’s agreement (if applicable).
- Meet with President to discuss administrator’s annual review (based on contract renewal date).
- Participate with President in administrator’s annual review (based on due date and policies).
- Ensure compliance with policies regarding paid administrators.
- Meet with Chapter administrator to discuss expectations.
- Shadow process: proposed Board slate presented to current Board for approval of action of presentation to membership for election by acclimation.

### President

- Mid-year retreat (optional) Oct-Jan.
- Set up meeting with incoming President to review/train on Chapter administrator agreement.
- Participate with PE in Chapter administrator’s annual review. (NOTE: Based on contract due date).
- Review all policies regarding paid administrators and ensure you are compliant.
- Oversee Board vote: proposed Board slate presented to current Board for approval of action of presentation to membership for election by acclimation.
- Chapter Demographic Report has been refreshed. Review with Board members.

### Immediate Past President

- Mid-year retreat (optional) Oct-Jan.
- Present proposed Board slate to current Board for approval of action of presentation to membership for election by acclimation.
- Present Board slate to membership by end of January. Membership has 30 days to contest (see timeline and requirements here: CLRP>Compliance>March 1).



February

February

February

### Key Focus and objectives this month:

- Ensuring strong nominations and onboarding of new Board members.
- Supporting current Board and engaging them to finish the year strong.

### President Elect

- Work with facilitator on annual retreat agenda.
- Begin working with current president and immediate past president on a transition plan. NOTE: Transition plans and on-boarding take place April-May.
- Plan to run a board meeting and host an educational program before the end of the term to get practice.

### President

- Review mid-year Chapter performance summary to gauge progress. Share summary with the Board and focus on progress towards annual goals.
- Work with president-elect to create a plan for running one board meeting and hosting one education program prior to the end of the term.
- Board slate is complete with membership approval.
- Check in with president elect on progress for planning annual retreat.

### Immediate Past President

- At the close of the 30-day contestation period, send final Board slate to COM with support of Chapter administrator. Member ID's must be verified at the chapter level and included in the template. See CLRP>Compliance>March 1 for instructions and templates.





March

March

March

### Key Focus and objectives this month:

- Ensuring strong nominations and onboarding of new board members.
- Supporting current board and engaging them to finish the year strong.
- Preparing for Chapter Leadership Summit and setting leaders for new term up for success.

### President Elect

- Slate due to MPI Global March 1.
- Continue retreat facilitator agenda calls and finalize initial retreat details.
- Send welcome message to incoming Board members and encourage them to observe board meetings and attend all required trainings. Provide complete details for upcoming annual retreat.
- New incoming Board gains access to CLRP – schedule training in transitions or orientation.

### President

- Slate due to MPI Global March 1.
- Confirm president elect has invited new Board members to observe Board meetings and attend planning transitions.
- Attend Board service training and ensure all new Board members for attend.
- Recognize and thank volunteers.

### Immediate Past President

- Final Board slate for the coming term is due to MPI Global March 1.
- Convene Governance and Nominating Committee to review approved Board slate and identify any additional recruitment needs.
- Send Governance and Nominating Committee a thank you for their commitment to the Chapter’s succession planning processes.
- Keep board on task with governance.



April

April

April

## Key Focus and objectives this month:

- Chapter Leadership Summit.
- Ensure Chapters are onboarding and training new Board members.
- Face to face leader engagement.
- Ensuring Chapters finish the year strong.

### President Elect

- Annual retreats (Apr-Jun)
- Confirm all new Board members are registered for and attend the Chapter Leadership Summit. This event includes role-specific training.
- Begin Board transition process.

### President

- Annual retreats (Apr-Jun)
- Ensure Board members are registered for and participate in the Chapter Leadership Summit.
- Format and send mid-year retreat RFP for April-June (optional).
- Begin meeting with potential Governance and Nominating Committee candidates and review succession planning and nomination process for upcoming term as immediate past president (Note – President appoints the committee in July so partner with the current president elect in tandem).
- Focus on leading, training and coaching the president elect.

### Immediate Past President

- Support the president elect in efforts with transitioning boards effectively.
- Prepare to transition the president into your role; ensure they understand the nominations process.
- Consider everything you learned and what you wish you would have known; be sure to share that with your successor.



May

May

May

### Key Focus and objectives this month:

- Ensuring strong plans are in place for coming term.
- Ensuring all new incoming Board members are equipped and trained to perform new role.
- Face to face leadership engagement.
- Ensure all new Board members understand partnership with MPI Global and how to access resources.

### President Elect

- Annual retreats (Apr-Jun).
- Work on Business Plans, Budget, Chapter Operations Form, Administrator Agreements, Volunteer Leader Agreements, and written Succession Process. All compliance documents are due by June 15, reference Chapter Policy Manual for current list of requirements.
- Establish MPI Foundation Liaison (in many cases this is the president elect but could be any other VP.
- Review Metrics and Performance Standards and ensure clear understanding of what success looks like.

### President

- Annual retreats (Apr-Jun).
- Begin mid-year retreat planning to be held Oct-Jan (optional). Explore dates and venue.
- Governance and Nominating Committee selection process and review/revision of written nomination process continues.
- Support president elect on preparation of Business Plans, Budget, Chapter Operations Form, Chapter Administrator Agreements, New Member On-Boarding, Volunteer Leader Agreements and written Succession Plan (all due to Global by June 15)

### Immediate Past President

- What next? – create a plan to stay actively growing and engaged
- Thank you for your volunteer service!



June

June

June

### Key Focus and objectives this month:

- Ensuring strong plans are in place for coming term.
- Ensuring all new incoming Board members are equipped and trained to perform new role.
- Face to face leadership engagement.
- Ensure all new Board members understand partnership with MPI Global and how to access resources.

### President Elect

- Annual retreats (Apr-Jun)
- All compliance documents submitted to COM/MPI Global by June 15 including the following:
  - Chapter Business Plan
  - 12-24 month Chapter Calendar of Events
  - Budget
  - Copy of Administrator Agreement
  - Chapter Operations Form
  - Written Succession Process (may be part of your policy manual)
  - Current Chapter Bylaws and Policy Manual
  - Signed Volunteer Leader Agreements

### President

- Annual retreats (Apr-Jun)
- All compliance documents submitted to COM/MPI Global by June 15 including the following:
  - Chapter Business Plan
  - 12-24 month Chapter Calendar of Events
  - Budget
  - Copy of Administrator Agreement
  - Chapter Operations Form
  - Written Succession Process (may be part of your policy manual)
  - Current Chapter Bylaws and Policy Manual
  - Signed Volunteer Leader Agreements
- Finalize mid-year retreat date, location, and facilitator (optional).
- Recognize and thank volunteers.

### Immediate Past President

- MPI relies on its volunteers to assist with creating programs that members need. Numerous opportunities are available at the chapter and International levels. Not only will you build your career and increase your industry knowledge, but your time and expertise will help the industry improve and grow as well.
- Thank you for your service!