



Incoming President-Elect Responsibility Timeline

APRIL:

- Attend Your Board Service Training if not already complete (to be completed prior to role specific)
- Attend Office Of President Role Specific Training – Invites will be sent mid-April
- Prior to retreats ensure you are transitioning your current role to incoming team member

JUNE

- Meet with your incoming Office of the President - develop plan for incorporating you into decisions and conversations for training throughout the year. Work as a trio
- Add all chapter specific items into your timeline to have a complete calendar
- Review and become familiar with Chapter Leader Resource Page (CLRP)/Office of the President section if not already
- Touch base with IPP on process and plan for nominations, committee and timeline

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 COM, 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 nominations processes and mid-year retreat

SEPTEMBER:

- Begin 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 COM, 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 – Transition planning and onboarding new BOD
 - Engaging with the Board for one-on-ones
- Format and send Annual Retreat RFP (for April – June)



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 orientations, work with your Administrator on this process
- Board one-on-ones take place to connect with current board members about succession
- Attend Nominations training with IPP and Nominations Committee
- 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 COM in this process; per policies your COM 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 and policies)
- 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 COM, recommended agenda items to include:
 - Retreat Review
 - Transition Meetings
 - Stepping Up to the Plate
- Finalize Annual Retreat dates, location and Facilitator with COM
- 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 to run or have portions to run of a board meeting & educational program before the end of the term to get practice

MARCH:

- Slate due to COM/MPI Global – March 1st
- Continue Retreat Facilitator Agenda calls
- Finalize initial retreat agenda



- Send welcome to new incoming Board members and encourage them to attend board meetings, attend all required trainings, “Your Board Service” and Role Specific. Invites sent to each by Global
- Welcome from COM to new Board members
- New incoming Board gains access to CLRP – Training should happen in transitions or orientations

APRIL:

- Board attends role specific trainings – ensure all your team members attend their respective role
- Begin Board Member Transition Process (*See Transition Manual Document or chapter policy*)
- 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 COM/ MPI Global by June 15th; 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 COM (*Note: All metric goals are chapter driven with the exception of the satisfaction goal)

JUNE:

- All documentation to COM / 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)
 - Updated Bylaws as well as Policies & Procedures

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