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
  o 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
  o 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:
  o Retreat Review
  o Transition Meetings
  o 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**