



Incoming President Responsibility Timeline

JULY:

- Work on finalizing location and Facilitator for Mid-Year Retreats. (***NOTE:** Held October 15 – February and Facilitators are required to be approved by COM per policies)
 - It is ideal to carry Facilitators through a full calendar year for consistency
 - Also consider graduating facilitators after a number of years
- Select Nominations Committee and have board vote to approve; should happen in July or August at the latest
- Begin tax preparation with taxes and yearend financials due to MPI Global by October 1st; work with Chapter Administrator on this and accountant if chapter has one
- Change bank signature cards to account for new leadership (Administrator support)
- Ensure all annual filings for state requirements have been completed (Administrator support)
- Meet with Office of the President and Chapter Administrator to review Policies and plan for how you will ensure board stays compliant throughout the year (*Note: Part of IPP job description)
- Update timeline to include any chapter responsibilities
- Ensure all dashboard entries for previous term have been completed prior to close of July and are accurate – Necessary to receive metrics and chapter awards.
- Begin sending monthly board packets to COM, should include the following:
 - Board Meeting Minutes
 - Board Report Packet which should include: agenda, minutes of previous meeting, board reports, motions to be introduced, previous month's financials, updated Business Plan, Education Calendar, Balance Sheet, and monthly P&L
 - Administrators normally support this process

AUGUST:

- First COM Quarterly Call with Presidents; recommended agenda items are as follows:
 - Review driving your metrics and reviewing them at board meetings / one-on-one COM calls as needed
 - Setting the tone and accountability
 - Managing your paid staff
- Finalize Mid-Year Retreat dates
- Finalize Mid-Year Retreat Facilitator Agreement
- Ensure you are including your PE on all necessary communication and reports to board and COM
- Chapter Metric incentives from previous term, complete form and send to CBM by August 31st
- Chapter yearend results are being calculated for awards and performance assessment check with COM on setting up a call for your annual review



SEPTEMBER:

- Mid-Year Retreat agenda call with Facilitator & COM (allow time for PE to present transition training and expectations)
- 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

OCTOBER:

- Second COM Quarterly Call with Presidents; recommended agenda items are as follows:
 - Succession – Creating the Environment
 - Accountability - Are you touching base with teams
- Taxes and yearend financials due to MPI Global by October 1st
- Mid-Year Retreats beginning now through February
- Review Succession Plan with Board (standing agenda item at Board Meetings moving forward)
- Ensure you are compliant with Policies on Succession Guidelines and Board is familiar with them

MID NOVEMBER – MID JANUARY:

- Potential Retreat takes place
- Nominations Process is working through selecting new board per policies (board vote no later than end of January)

JANUARY:

- 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)
- Be sure to highlight all policies regarding Paid Staff and ensure you are compliant
- Board to vote on new slate and have to membership for vote by last week of January

FEBRUARY:

- Third COM Quarterly Call with Presidents; recommended agenda items are as follows:
 - Transitioning / Onboarding
 - Financial and Business Plan Updates
 - Preparing your President-Elect
- Work with President-Elect on a plan for running one board meeting and one education program prior to the end of the term
- Board slate is completed with membership approval
- Check in with PE to see how progress for annual retreat is coming

MARCH:

- Slate due to MPI Global no later than March 1st per Bylaws
- Ensure new board is presented to membership. PE should invite new board to attend board meetings and planning transitions



- Welcome to new board members from your COM with need to know dates
- Attend Your Board Service training and ensure all board members for new term are attending
- Third Quarter departmental meetings as needed.

APRIL:

- Fourth COM Quarterly Call with Presidents; recommended agenda items are as follows:
 - My MPI Career - What are my options?
 - Assisting PE with Metric Program & Performance Standards as needed
 - Overview of Your Year as IPP
- Meet with your COM on the Metric Program and Performance Standards review; Goals are chapter driven except for Satisfaction Scores
- Retreats begin between April 1st and June 30th per policies
- Begin meeting with potential Nominating Committee candidates and review succession planning & written nomination process for upcoming term as IPP (*Note - President selects new candidates in July so partner with your PE now in tandem to be ready)
- Applications due for MPI Global International committees
- **FOCUS:** Leading, training, coaching your PE's

MAY:

- Retreats continue
- Nominating Committee selection process and written nomination process continues
- Support PE on preparation of Business Plans, Budget, Chapter Operations Form, Chapter Administrator Agreements, New Member On-Boarding and Written Succession Plan (all due to Global by June 15th)

JUNE:

- All documentation to MPI Global to include the following:
 - Chapter Business Plan
 - Education Calendar
 - Budget
 - Administrator Agreement
 - Chapter Operations Form
 - Written Succession Plan
 - Membership Strategy Plan
 - Updated Policies and Procedures & Bylaws

NOTE: FOR LIST OF RESOURCES AVAILABLE TO PRESIDENTS & PE's [click here](#)