



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:

President-elect	President	Immediate Past President
□ Shadow the President throughout the year to set yourself up for success. □ Plan the mid-year retreat in concert with the President. □ Review and become familiar with Chapter Bylaws, Chapter Policy Manual, and Roberts Rules of Order.	□ Mentor the President-elect. □ Include the President-elect in all communications with the Board. □ Develop Board members to prepare them for their current and future volunteer roles.	□ Mentor the President. □ Support the Office of President with governance at Board meetings. □ Ensure the Board stays compliant with the Chapter Bylaws and Chapter Policy Manual. □ Manage the nominations process as Chair of the Governance and Nominating Committee.



Office of the President – 12-month Timeline

January

January

January

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.
- Chapter Bylaws/Policy Manual – make sure full board has a copy and that 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 Immediate Past President to appoint Governance and Nominating Committee and seek Board approval by end of February.
- Update bank signature cards.
- Begin tax preparation and ensure all annual filings for state/local requirements.
- Meet with Office of the President and Chapter Administrator to review and update Chapter Policy Manual.
- Set expectations with your Chapter Administrator (if applicable).
- Begin submitting monthly board packets to ROM: 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 Chapter 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).



Office of the President – 12-month Timeline

February

February

February

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.
- Chapter Bylaws/Policy Manual – make sure full board has a copy and that 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.
- 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

- Work with Immediate Past President to appoint Governance and Nominating Committee and seek Board approval by end of February.
- Chapter year-end results are being calculated for awards and performance assessment.
- Annual performance review with ROM.
- Taxes and year-end financials.

Immediate Past President

- Finalize decisions about whether new committees or Board roles are required to support initiatives (requires Board approval).
- Officially welcome Governance and Nominating Committee with expectation of plan for the year. Include dissemination of nominations policies and timeline.



Office of the President – 12-month Timeline

March

March

March

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

President

- ☐ Finalize mid-year retreat (optional) agenda and communicate to Board at least 30 days prior to retreat. Ensure Board is attending.
- ☐ Recommended quarterly departmental touch-base calls or meetings.
- ☐ Chapter performance assessment calls with ROM – review as Office of President and Chapter Administrator. Once complete, share with Board at next board meeting or retreat.
- ☐ Taxes and year-end financials.

Immediate Past President

- ☐ Review and revise Board application process as necessary
- ☐ Invite Governance and Nominating Committee to attend succession & nominations training provided by MPI.
- ☐ Announce the makeup of the Governance and Nominating Committee and the upcoming Nominations process via Chapter communications.



Office of the President – 12-month Timeline

April

April

April

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) April-June. 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 board of directors.
- Format and send annual retreat RFP (for September-November).

President

- Mid-year retreats (optional) April-June.
- Create an environment that is welcoming of succession.
- Accountability - are you touching base with teams?
- 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 MPI.
- April is National Volunteer Month (USA) and National Volunteer Week (USA and Canada). Recognize and thank volunteers.

Immediate Past President

- Mid-year retreats (optional) April-June.
- Prepare official invite for Board applications to be sent in April (see your Chapter succession policy and timeline, full process to be complete by end of July).
- Finalize Board application process.
- Ensure previous fiscal year awards are communicated to Chapter members (if applicable) and VP communications utilizes current graphics and banners.



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May

June

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.
- Ensuring strong nominations.

President-elect

- Mid-year retreats (optional) April-June.
- Board orientation - work with your Chapter 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 September-November. Explore dates and venue. Begin interviewing and securing annual retreat facilitator (must be an MPI Verified Facilitator).

President

- Mid-year retreat (optional) April-June.

Immediate Past President

- Mid-year retreat (optional) April-June.
- Support President-elect with transition planning.
- Present any updated Chapter Bylaws and Chapter 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.
- Present the proposed slate to current Board for approval of action of presentation to membership for election by acclamation.
- Present Board slate to membership by end of June. Membership has 30 days to contest (see timeline and requirements here: [CLRP > Compliance > August 1.](#))



Office of the President – 12-month Timeline

July

July

July

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

- Finalize annual retreat dates, location, and facilitator with ROM. Finalize facilitator agreement.
- Familiarize yourself with current Chapter Administrator's agreement (if applicable).
- Meet with President to discuss Chapter Administrator's annual review (based on contract renewal date).
- Plan Chapter Administrator's annual review with President.
- Ensure compliance with policies regarding Chapter Administrators.
- Shadow process: proposed Board slate presented to current Board for approval of action of presentation to membership for election by acclamation.

President

- Set up meeting with incoming President to review/train on Chapter Administrator agreement.
- Plan Chapter Administrator's annual review process with President-elect.
- Review all policies regarding Chapter 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 acclamation.
- Chapter Demographic Report has been refreshed. Review with Board members.

Immediate Past President



Office of the President – 12-month Timeline

August

August

August

Key Focus and objectives this month:

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

President-elect

- Board slate is complete with membership approval and is due to MPI August 1.
- 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 October-November.
- Plan to run a board meeting and host an educational program before the end of the term to get practice.

President

- Board slate is complete with membership approval and due to MPI August 1.
- 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.
- Check in with President-elect on progress for planning annual retreat.

Immediate Past President

- Final Board slate for the coming term is due to MPI August 1.
- At the close of the 30-day contestation period, send final Board slate to ROM with support of Chapter Administrator. Member ID's must be verified at the Chapter level and included in the template. See CLRP>Compliance>August 1 for instructions and templates.



Office of the President – 12-month Timeline

September

September

September

Key Focus and objectives this month:

- Chapter Leadership Summit (virtual).
- Onboarding of new board members.
- Supporting current board and engaging them to finish the year strong.
- Setting leaders for new term up for success.

President-elect

- Annual retreats (September-November).
- 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.
- Confirm all new Board members are registered for and attend the Chapter Leadership Summit (virtual). This event includes role-specific training.
- Attend Chapter Leadership Summit (virtual).

President

- Annual retreats (September-November).
- 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 attend.
- Ensure Board members are registered for and participate in the Chapter Leadership Summit (virtual).
- Recognize and thank volunteers.
- Attend Chapter Leadership Summit (virtual).

Immediate Past President

- Together with Governance and Nominating Committee, review open Board positions and work to fill them.
- Send Governance and Nominating Committee a thank you for their commitment to the Chapter's succession planning processes.
- Keep board on task with governance.
- Attend Chapter Leadership Summit (virtual).
- Share International Volunteer Committee and Board opportunities with Past Presidents
<https://www.mpi.org/membership/global-volunteer-center>.
- Encourage members to apply to serve on an International Volunteer Committee or Board (IBOD, CMAC, Regional Councils, etc.). Term begins January 1.



Office of the President – 12-month Timeline

October

October

October

Key Focus and objectives this month:

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

President-elect

- Annual retreats (September-November).
- Begin Board transition process.
- Develop format and send RFP for mid-year retreat in April-June (optional).

President

- Annual retreats (September-November).
- 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 January 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.
- Review opportunities for RISE Awards nomination/application with the Board.
- Share International Volunteer Committee and Board opportunities with Past Presidents
<https://www.mpi.org/membership/global-volunteer-center>.
- Consider applying for an International Volunteer opportunity.



Office of the President – 12-month Timeline

November

November

November

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 (September-November).
- Work on Business Plans, Budget, Chapter Operations Form, Chapter Administrator Agreements, Volunteer Leader Agreements, and written Succession Process. All compliance documents are due by December 1, reference Chapter Policy Manual for current list of requirements.
- Review Metrics and Performance Standards and ensure clear understanding of what success looks like.

President

- Annual retreats (September-November).
- Begin mid-year retreat planning to be held April-June (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 MPI by December 1).
- Applications due for MPI International Committees and Boards.

Immediate Past President

- What's next? – create a plan to stay actively growing and engaged.
- Encourage members to apply to serve on an International Volunteer Committee or Board (IBOD, CMAC, Regional Councils, etc.). Term begins January 1.



December

December

December

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 and how to access resources.

President-elect

- All compliance documents submitted to ROM/MPI by December 1, including the following:
 - Chapter Business Plan
 - 18–24-month Chapter Calendar of Events
 - Budget
 - Copy of Chapter Administrator Agreement
 - Chapter Operations Form
 - Current Chapter Bylaws and Chapter Policy Manual
 - Signed Volunteer Leader Agreements

President

- All compliance documents submitted to ROM/MPI by December 1, including the following:
 - Chapter Business Plan
 - 18–24-month Chapter Calendar of Events
 - Budget
 - Copy of Chapter Administrator Agreement
 - Chapter Operations Form
 - Current Chapter Bylaws and Chapter Policy Manual
 - Signed Volunteer Leader Agreements
- Finalize mid-year retreat date, location, and facilitator (optional).
- December 5 is International Volunteer Day. Recognize and thank Chapter volunteers.

Immediate Past President

- Review opportunities for RISE award nominations with the Board. Submit nominations/application (if applicable).
- Thank you for your service!