

Board Position: President

Objective:

Provide leadership and direction to the chapter throughout the assigned term. Guide the board in achieving chapter goals, maintaining effective operations, and preparing future chapter leaders.

Responsibilities:

- ☐ Lead monthly board meetings and work with the Secretary to prepare the agenda and organize board reports.
- ☐ Guide discussion, support board decisions, assign follow-up responsibilities, and ensure action items are completed.
- ☐ Coordinate the annual strategic planning meeting and work with board members to establish clear goals, timelines, and responsibilities.
- ☐ Work with the Treasurer and President-Elect to develop the annual budget and review financial progress throughout the year.
- ☐ Provide oversight and support for chapter programs, events, membership efforts, advocacy activities, HUPAC goals, and Triple Crown requirements.
- ☐ Maintain regular communication with board members and encourage participation, accountability, and teamwork.
- ☐ Recruit members for open leadership positions and support succession planning and board development.
- ☐ Ensure the chapter follows its bylaws, policies, financial procedures, and reporting requirements.
- ☐ Work closely with the President-Elect and complete an organized transition at the end of the term.

Expected Time and Participation:

Monthly Board Meetings and Follow-Up

Annual Strategic Planning and Budget Preparation

Chapter Meetings, Programs, and Events

Regular Communication with Officers and Committee Chairs

Leadership Recruitment, Succession Planning, and End-of-Term Transition

Getting Started:

- ☐ Meet with the Immediate Past President, President-Elect, Secretary, and Treasurer to review current goals, finances, upcoming deadlines, and unfinished business.
- ☐ Review the chapter bylaws, policies, annual calendar, budget, strategic plan, and board contact list.
- ☐ Confirm that each board member understands their responsibilities, annual goals, and reporting expectations.

During the Term:

- ☐ Review chapter goals, board participation, and financial progress regularly.
- ☐ Keep the board informed of important deadlines, decisions, and upcoming events.
- ☐ Follow up on action items without taking over responsibilities assigned to other officers or committee chairs.
- ☐ Recognize volunteers and celebrate chapter progress throughout the year.
- ☐ Document important decisions, challenges, and lessons learned for the next President.

Handling Board Issues:

- ☐ Address board disagreements, participation concerns, or missed responsibilities promptly, privately, and professionally. Focus on the issue, chapter expectations, and an agreed-upon resolution.
- ☐ Refer to the chapter's bylaws, policies, and established responsibilities, and involve the appropriate chapter or state leader when additional support is needed.
- ☐ Document significant concerns, decisions, and follow-up steps while maintaining appropriate confidentiality.
- ☐ If the issue cannot be resolved at the chapter or state level, refer the matter to the NABIP National Board of Trustees for review and investigation.
- ☐ Immediately escalate serious concerns involving harassment, discrimination, retaliation, financial misconduct, legal matters, or significant policy violations through the appropriate NABIP process.

Keys to Success:

- ☐ Lead the board rather than trying to complete every task personally.
- ☐ Delegate administrative responsibilities to the appropriate officer or committee chair.
- ☐ Keep chapter goals visible and review progress throughout the year.
- ☐ Address participation or performance concerns early and professionally.
- ☐ Ask for assistance from the Immediate Past President, state chapter, Regional Vice President, or NABIP when needed.

- ☐ Keep the President-elect informed and involved throughout the term.

Important Reminder:

The President provides leadership, direction, and accountability but is not expected to perform every chapter responsibility. Work through the appropriate officers, committee chairs, and NABIP leadership resources.

NABIP Chapter President's Meeting Guide

Purpose

As President, your role is to facilitate the meeting, not dominate the discussion. Your responsibilities include ensuring the meeting is conducted fairly, members have the opportunity to participate, and business is completed efficiently in accordance with the chapter's bylaws and NABIP's parliamentary authority.

The President's role is defined as **"lead and coordinate"** rather than **"perform."** A helpful rule of thumb is:

- **President:** Sets priorities, builds the agenda, facilitates meetings, and ensures follow-up.
 - **Secretary:** Maintains the official records and meeting documentation.
 - **Treasurer:** Oversees the chapter's finances and financial reporting.
 - **President-Elect/Vice President:** Supports the President, manages logistics, and prepares for future leadership.
 - **Committee Chairs:** Lead their respective areas and bring recommendations to the Board.
 - **Administrator/Association Executive (if the chapter has one):** Provides administrative support, communications, and operational coordination.
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Before the Meeting

Prepare

- ☐ Review the agenda.
 - ☐ Review the previous meeting's action items.
 - ☐ Read committee reports.
 - ☐ Review any motions that have been submitted.
 - ☐ Confirm presenters and guest speakers.
 - ☐ Verify the Secretary has the previous meeting's minutes.
 - ☐ Confirm the Treasurer has the financial report.
 - ☐ Ensure a quorum is expected.
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Opening the Meeting

1. Call the Meeting to Order

“Good (morning/afternoon/evening). The meeting of the NABIP [Chapter Name] is now called to order.”

2. Establish a Quorum

Ask the Secretary if a quorum is present.

If a quorum exists:

“A quorum is present.”

If not:

“A quorum is not present. We will limit today’s meeting to discussion and other business permitted by the bylaws.”

3. Welcome Members and Guests

- Welcome first-time attendees.
 - Introduce guests.
 - Recognize sponsors, if applicable.
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Approval of the Minutes

“The minutes from our previous meeting were distributed in advance.”

“Are there any corrections?”

(Pause.)

If none:

“The minutes are approved as presented.”

If corrections are offered:

“If there are no further corrections, the minutes are approved as corrected.”

Treasurer’s Report

“I now recognize the Treasurer for the financial report.”

After the report:

“Are there any questions?”

“The Treasurer’s report will be filed for audit.”

(Unless your bylaws require formal acceptance.)

Officer Reports

Recognize officers in the order established by your chapter.

Example:

- President
 - President-Elect
 - Vice President
 - Secretary
 - Treasurer
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Committee Reports

Invite committee chairs to report.

Examples:

- Membership
- Professional Development
- Legislative
- PAC
- DEIB
- Media

After each report:

“Are there any questions?”

Unfinished Business

“Is there any unfinished business from our previous meeting?”

Address any motions that were postponed.

Review outstanding action items.

New Business

Introduce each agenda item separately.

When a motion is made:

- State the motion.
- Allow discussion.
- Keep discussion focused.
- Ask if anyone wishes to speak before calling the question.

Example:

“It has been moved and seconded that...”

“Is there any discussion?”

(Pause.)

“If there is no further discussion, we will proceed to a vote.”

President’s Report

Provide updates on:

- Chapter accomplishments
- State news
- NABIP updates
- Upcoming deadlines
- Strategic initiatives
- Volunteer opportunities

Keep remarks concise.

Upcoming Events

Review:

- Educational programs
 - Networking events
 - Advocacy activities
 - State meetings
 - NABIP national events
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Member Announcements

Invite members to share announcements.

Keep announcements brief.

Open Forum (Optional)

Allow members to ask questions or provide feedback.

If an issue requires additional research:

“Thank you. We will review that and report back.”

Closing

Review action items.

Confirm who is responsible for each task.

State important deadlines.

Announce the next meeting date.

Adjournment

“If there is no further business, the meeting is adjourned.”

(Gavel, if used.)

President's Best Practices

Before Speaking

- ✓ Stay neutral while members are debating.
 - ✓ Let members finish before responding.
 - ✓ Restate motions clearly before discussion.
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During Discussion

- ✓ Encourage participation from everyone.
 - ✓ Keep debate respectful.
 - ✓ Redirect discussion if it goes off topic.
 - ✓ Summarize complicated discussions.
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Time Management

- ✓ Start on time.
 - ✓ End on time.
 - ✓ Keep reports concise.
 - ✓ Move discussions toward decisions.
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Leadership

- ✓ Recognize volunteers.
 - ✓ Thank committee chairs.
 - ✓ Celebrate chapter successes.
 - ✓ Focus on solutions rather than problems.
 - ✓ Encourage future leaders to become involved.
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After the Meeting

- ☐ Confirm all action items.
- ☐ Check in with committee chairs.
- ☐ Follow up with members assigned tasks.
- ☐ Review draft minutes with the Secretary.
- ☐ Ensure any required reports are submitted to the state chapter or NABIP National.
- ☐ Begin planning the next meeting.