

Board Position: President-elect

Objective:

Support and shadow the current President while learning chapter operations and preparing to assume the presidency in the next term. Assist with leadership transition, incoming officer preparation, and planning for the upcoming year.

Responsibilities:

- ☐ Work collaboratively with the President and assist with chapter priorities, meetings, and assigned initiatives.
- ☐ Work with the President and Treasurer to identify budget needs and priorities for the upcoming term.
- ☐ Begin developing proposed goals for the upcoming presidency in collaboration with the President and appropriate committee chairs, including Legislative, Media, Awards, and NABIP PAC.
- ☐ Assist with recruiting members for open board and committee positions.
- ☐ Meet with incoming officers and committee chairs to review responsibilities, expectations, and transition needs.
- ☐ Support an organized leadership transition and help ensure important information, deadlines, and unfinished business are carried forward.
- ☐ Attend chapter meetings, programs, and events to gain a clear understanding of chapter operations and leadership needs.
- ☐ Become familiar with the chapter's bylaws, policies, budget, strategic plan, and reporting requirements.
- ☐ Support or assume additional responsibilities as appropriate and as provided in the chapter's bylaws.

Expected Time and Participation:

Monthly Board Meetings

Regular Collaboration with the President

Chapter Meetings, Programs, and Events

Strategic Planning, Budget Preparation, and Leadership Transition

Getting Started:

- ☐ Meet with the President, 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 responsibilities.
- ☐ Establish regular check-ins with the President.
- ☐ Identify anticipated board and committee vacancies and begin recruitment planning.

During the Term:

- ☐ Observe and assist the President while learning how the chapter operates.
- ☐ Support assigned responsibilities without taking over duties that belong to the President or other officers.
- ☐ Track transition needs, open positions, upcoming deadlines, and plans for the following year.
- ☐ Build working relationships with officers, committee chairs, state leaders, the Regional Vice President, and NABIP resources.
- ☐ Keep incoming leaders informed and involved so they are prepared to begin their terms.

Preparing for the Presidency:

- ☐ Develop proposed goals, priorities, and timelines for the upcoming term in collaboration with the President.
- ☐ Work with the Treasurer to understand the chapter's financial position and future budget needs.
- ☐ Confirm that incoming officers and committee chairs understand their roles and have the information needed to begin successfully.
- ☐ Review unresolved matters, lessons learned, and recommendations with the current President.
- ☐ Prepare an initial calendar, meeting priorities, and leadership expectations before assuming office.

Keys to Success:

- ☐ Be an active and dependable partner to the President.
- ☐ Ask questions and use the term to learn all areas of chapter operations.
- ☐ Begin leadership recruitment and succession planning early.
- ☐ Keep transition information organized and communicate regularly with incoming leaders.
- ☐ Respect the President's leadership while preparing thoughtfully for the next term.

Important Reminder:

The President-elect should observe, assist, learn, and prepare for the next term while working collaboratively with the current President. Responsibilities may vary based on the chapter's bylaws, leadership structure, and the needs of the President and board.