

Presidents-Elect: Preparing for Presidency

Many volunteers use the term as President-Elect to become familiar with Academy and Affiliate programs, roles and responsibilities. The following checklist is provided as a guide to assist for the President Elect year.

Remember to stay in close communication with the current President. Some of these below items overlap with the current President's duties, and you want to be sure the two of your positions are aligned and in ongoing communication.

Twelve (12) months out from Presidency

- Become familiar with the Governance Management website - <https://community.eatrightpro.org/dpgmigaffiliateleaders/home>. Log in using your Academy ID and password.
- Begin an annotated journal of the year and keep track of the ideas you have for your presidency.

Eleven (11) months out from Presidency

- Locates of important documents such as
 - Affiliate annual budget and strategic plan/plan of work
 - Affiliate calendar of events
 - Affiliate Board of Directors and committee roster and appointments
 - Affiliate vendor and sponsor contracts
 - Academy and affiliate bylaws
 - Affiliate policies and procedures
 - Legislative agenda

Ten (10) months out from Presidency

- Begin to review Affiliate documents (listed above)
- Learn how the affiliate plans to meet its goals.
- Become familiar with key Academy activities, affiliate activities, legal and financial aspects and liability insurance.
- Meet regularly with the President and Executive Director to understand the daily operations of the affiliate.

Nine (9) months out from Presidency

- Review the Academy products, services and activities available to affiliates.
- Review Affiliate services and benefits to your members.
- Review past affiliate membership survey data.

Eight (8) months out from Presidency

- Begin to think about committees and appointed positions in relation to the strategic plan for the coming year.
- Become familiar with your membership numbers by membership category. See if your membership has grown or decreased. Review data at <https://reports.eatright.org>. Log in can be obtained from your President.

Seven (7) months out from Presidency

- Discuss possible executive board candidates with the nominating committee.

Six (6) months out from Presidency

- Review the current affiliate strategic plan or plan of work and the budget with the current president to start preparing updates for the coming year.
- Discuss status, outcomes and required adjustments for the coming year.
- Become familiar with the Academy and Affiliate awards process and dates.

Five (5) months out from Presidency

- Ask outgoing committee members to review their projects, the outcomes of the projects and their fiscal needs. Have them establish goals and budget requests for the following year.
- If the affiliate and districts have a formal relationship, contact district presidents-elect and discuss your vision for the upcoming year. Ask them to begin forming their leadership teams and send the affiliate their program of work and list of officers and committees.
- Initiate budget planning with the Finance Committee. Be sure it aligns with goals and objectives of the strategic plan. Utilize the goals and budget requests from committee members.
- Attend the affiliate President Elect training hosted by the Academy. (January)

Four (4) months out from Presidency

- Identify members and potential leaders whom you may wish to ask to volunteer.
- Work with President and Executive Director to ensure position descriptions, policies and procedures, and best practices are being update by committees.

Three (3) months out from Presidency

- Choose committee chairs and appoint leaders.
- Finalize budget and strategic plans.
- Begin thinking about how you will orient new board members and plan a transition meeting for June.

Two (2) months out from Presidency

- Work with new leadership team and executive director to plan the affiliate calendar.
- Have incoming committee members speak with the volunteers they are succeeding. Ensure proper transitions are in place.
- Work with the president to conduct a board assessment and finalize a board of director's orientation to focus on areas of improvement and to orientate your team to the strategic plan, the calendar, affiliate policies and procedures, Academy strategic plan, Academy products, and services.

One (1) month out from Presidency

- Meet with out-going officers, seeking advice from those concluding their leadership year.
- Thank out-going officers.
- Install and welcome incoming leaders.

Begin role as President!