

President-Elect: Preparing for Presidency

Many volunteers use the term as President-Elect to become familiar with ACOEM and Component 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 Component Leader Hub on the ACOEM Website – <https://acoem.org/hub>.
- Begin an annotated journal of the year and keep track of the ideas you have for your presidency.

Eleven (11) months out from Presidency

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

Ten (10) months out from Presidency

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

Nine (9) months out from Presidency

- Review the ACOEM products, services and activities available to Components.
- Review Component services and benefits to your members.
- Review past Component 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.

Seven (7) months out from Presidency

- Discuss possible executive board candidates with the nominating committee.

Six (6) months out from Presidency

- Review the current Component 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 ACOEM and Component 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.
- Identify members and potential leaders whom you may wish to ask to volunteer.

Four (4) months out from Presidency

- 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.

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 prior to change in terms.

Two (2) months out from Presidency

- Work with new leadership team and executive director, if applicable, to plan the Component calendar.
- Conduct a self-assessment; where are leadership strengths? Where are areas for development?
- 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, Component policies and procedures, ACOEM strategic plan, ACOEM 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!