



PRESIDENTS' TRAINING LIFECYCLE (PTL)

LEAD

MID-YEAR CHECKLIST



JANUARY

- Apply for Path of Leadership (PoL) roles
- Assist the president-elect with identifying board roles (using the Path of Leadership (PoL) succession guide available at presidentstraining.eonetwork.org/choose-your-board/)
- Set a date for a mid-year check-in with board against chapter priorities
- Conduct monthly meetings with your president-elect to transition items
- Outline the purpose and importance of communicating to your board about attending Global Leadership Conference (GLC) with president-elect

FEBRUARY

- Establish a renewals team from chapter board members
- Establish a formal renewals plan and assign owners for each step
- Identify those responsible for outreach to at-risk members
- Host mid-year check-in (review MAP)
- Conduct monthly meetings with your president-elect to transition items
- Mid-year debrief with chapter staff

MARCH

- Schedule Forum visits to identify members at risk of not renewing
- Attend Presidents' Meeting with president-elect
- Ensure you or president-elect makes a motion to determine next year's chapter dues amount and communicate any changes to membership
- Review chapter bylaws with president-elect
- Review chapter budget with president-elect
- Review chapter staff roles and responsibilities with president-elect
- Conduct monthly meetings with your president-elect to transition items
- Ensure all presidents-elect attend the Global Leadership Conference (GLC) in April (work with chapter staff to confirm individually)

APRIL

- Review current board roles, changes and progress made over this fiscal year and identify a plan (including a final date) to transition board roles
- Have monthly meetings with your president-elect to transition items

MAY

- Meet with your chapter staff professional to identify any successful KPIs or other items that need to be completed before term ends
- Have monthly meetings with your president-elect to transition items
- Ensure all presidents-elect have the Chapter Officer Role and Responsibility Guide (found on eonetnetwork.org), especially those chairs who have not participated in the Global Leadership Conference (GLC)

JUNE

- Celebrate wins on any successfully reached metrics during your last board meeting; recognize board members and introduce the president-elect
- Conduct monthly meetings with your president-elect to fully transition items

Notes



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