

Great Lakes Chapter President & President-Elect Preparation

Chapter President Office
Duties and
Responsibilities



July 1, XXXX-1

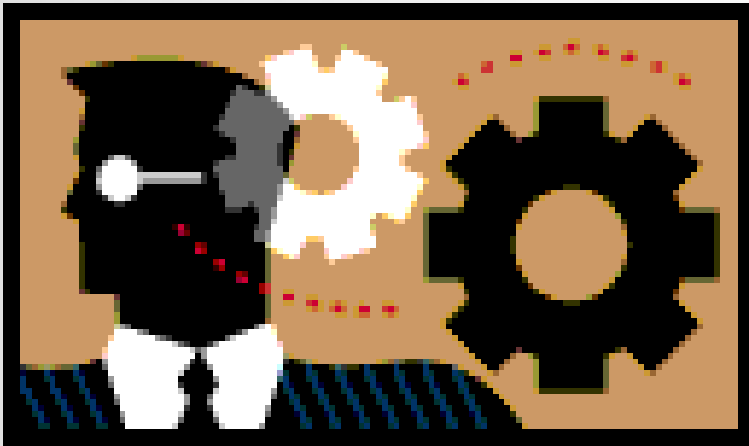


**Your job actually starts
with your election to
President-Elect**

**Spend the year getting to
know expectations**



Mirrors



- Regular conversations with the Current President
- sharing of e communications
- Discussion on CSI Issues

Outstanding Chapter *Time Line*



President-Elect

- Take an interest in sharing the events for your chapter.
- The MORE you get involved, the easier it will be for you at the top.



Chapter President

You Made It!

Congratulations!

(I'm Sorry....)



Paperwork

- Collect the right forms
 - Agenda templates
 - Meeting notice templates, emails
 - Board invitation lists,



- Agenda



- Budget



- Call list



- Meeting minutes



- Treasurers report



- Directors report



- Whatever report!



Paperwork \$\$\$

- Signature Cards
 - You are a signatory for the chapter now.
 - Treasurer can help with bank identification, location, joint visit
 - (they need to know it's you!)

- Budget presented July Board meeting, August Approval



Planning Meeting

- Get the new officers together for a planning meeting in June/July.
- Best move you will make!

Looking at your Year ahead



Program included (csinet.org)

Maintain/Update

- By-Laws
- Operating Guide
- Strategic Plans
- Surveys
- Officer Data Bases
- Chapter Communication Platform

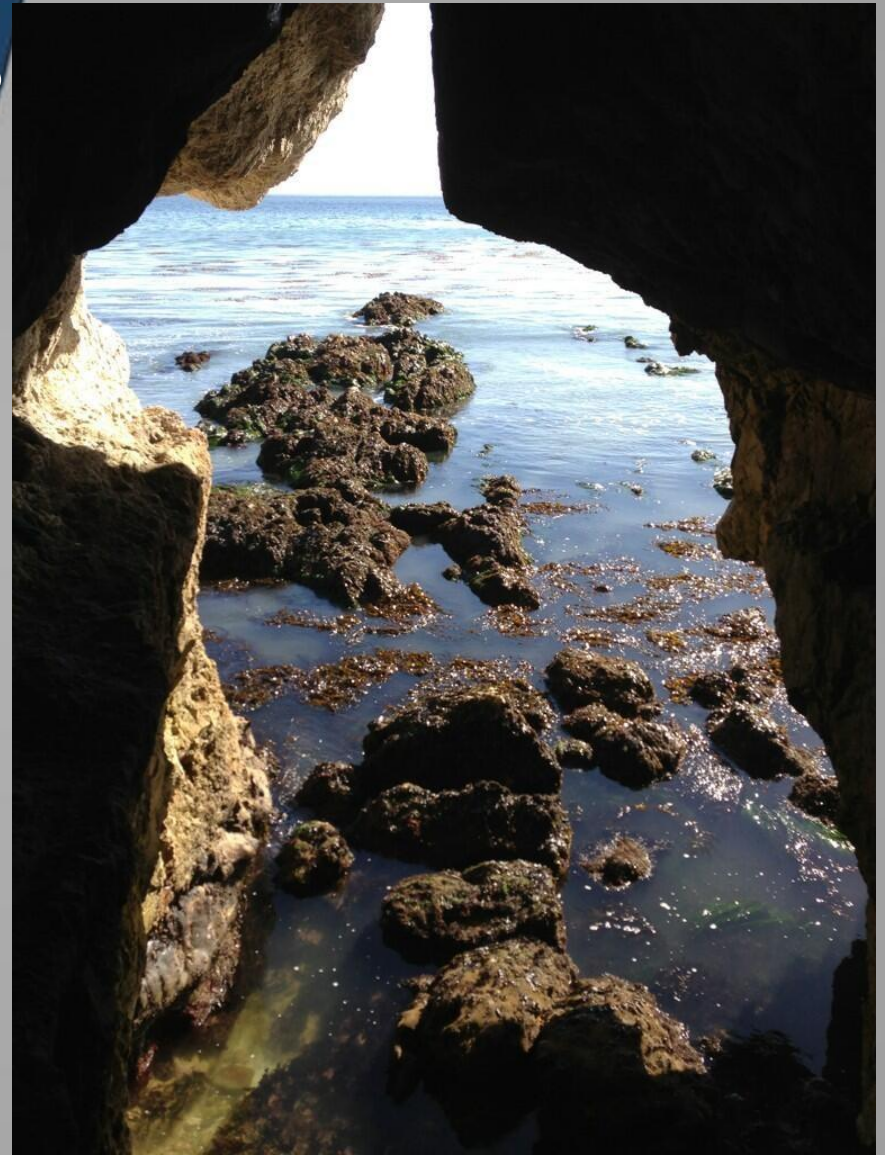


Foundation Stones

Traditional Events

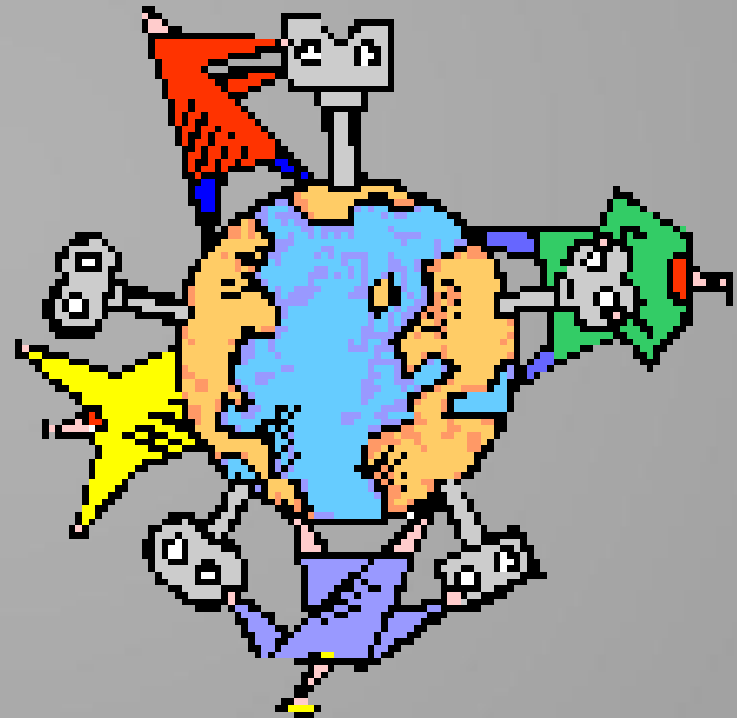
- Chapter Meetings
- Golf Outing
- Trade Show
- Newsletter

- *All Covered?*



Keystone Events

- “Day at the Races”
- “Procrastination Day”
- Member Orientation
- Scholarships
- Elections



**Hello Leader
Elections happen no later than the April Meeting!**

**February nominations
March visibility month
April Meeting vote,**

because.....

**Updating Forms for the
CSI Website is an
important part of the job.**



*Building Knowledge
Improving Project Delivery*

Institute Resources

<https://www.csiresources.org/chapterregionleaders/home>

Access Chapter and Region roster information.

ROSTER DASHBOARD

Use these update tools to share your chapter's governance information.

UPDATE TOOLS

Track key deadlines with the Chapter Planning Checklist.

PLANNING CHECKLIST

Updating Forms for the CSI Website is an important part of the job. May is typical due date.



Hello Leader

Awards Deadline- First Friday in May!



Awards are important for
the chapter



*Building Knowledge
Improving Project Delivery*

Rewards

- We have a GREAT Region with fantastic chapters.
- With a little forethought and communication...
- You will have a Great Year!!!!!!



Additional Tools:

Best Practices for Effective Chapter Meetings
Chapter Administration Guide
Chapter President Guide
LIFE Articles
Looking at your Year Ahead
Presidents Training
Social Media
Volunteer Leadership Management
Why CSI

Most Available on csinet.org
Others by request-
thadg@nationalgypsum.com

Happy Reading!



THANK YOU

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