



## **PAST PRESIDENT**

### **Summary**

The Past-President is the third year of the three years of responsibilities of a President-Elect. He or she assumes the role after serving one year as president. This position carries one vote. This position has several roles, explained below.

### **Minimum Qualifications**

Served as President or be appointed by the CRLA Board to serve if there is an unexpected vacancy.

### **Represents Board Representative at Past Officers' Council (POC)**

1. Attends the POC meeting at the annual conference and send a report to the Board.
2. Communicate with POC as directed by the Board.

### **Parliamentarian**

Provides means of conducting business at general Association meetings and Board meetings.

### **Specific Responsibilities**

1. Maintains on file the most up-to-date copies of CRLA Bylaws.
2. Serves as consultant for all questions of procedure relating to the Bylaws or to the conduct of a meeting.
3. Attends all official meetings of the general membership.

### **Annual Conference Co-Chair**

Serves as Conference Co-Chair alongside the President-Elect with the purpose of mentoring the President-Elect through the activities related to conference planning.

### **After the Annual Conference (at which you become Past President)**

1. Works with the Executive Director and management company design personnel to develop the Call for Proposals document.
2. Prepares the Call for Proposals for distribution at sister organization spring conferences and for advertisement through list-servs. Schedules an e-blast from CLADEA associations for January announcement of Call for Proposals.
3. Meets with the President-Elect to review the conference process and troubleshoot issues. Serves as a mentor and resource for conference questions.
4. In coordination with the President-Elect, contracts the keynote speakers and maintains communication with them throughout pre-conference planning.
5. Prepares specific documents for Board approval at the first Board meeting after which the management company has all conference financials and numbers finalized:
  - a. With the help of the CRLA Treasurer, prepares a Conference budget;
  - b. Develops Conference timeline of events and conference schedule to present to the Board for approval;
  - c. Determines and makes motion to Board to approve registration and approximate meal function costs.
6. Works with Executive Director and management company's Exhibits Chair to develop exhibitor fees, benefits, and prospectus.

7. Works with Board on registration dates and fees and gets the information to the Executive Director and into the appropriate documents.
8. Works with S/R/C Coordinator to promote upcoming conference within states and regions.
9. Appoints/confirms Conference Committee chairpersons and maintain communication with each:
  - a. Program Chair, if you choose not to retain this role, to determine which institute and session proposals to accept;
  - b. Lunch with a Mentor Chair;
  - c. Mobile App Events Chair;
  - d. Awards and Scholarship Chair;
  - e. SIG Coordinator who oversees Proposal Review Committee (SIG Leaders).
10. Works with On-site Chair to ascertain who will serve on site committees.
11. Works with management company to prepare the conference website, including information for persons submitting proposals and work with the management company to make it available as soon as possible after the conference.
12. Reviews and finalizes proposal evaluation rubric.
13. Communicates with Proposal Review Committee about the timeline, procedures, and evaluation rubric.
14. Maintains ongoing communication with the Executive Director and the management company regarding the CRLA Conference System to ensure accuracy and troubleshoot issues.
  - a. Send thank you letters to members of the Proposal Review Committee and complimentary letters to any administrators they request.
15. Creates a schedule of sessions that balances the presenters' schedules, AV requirements, room availability, SIG needs, S/R/C meetings, committee needs, etc., and notify presenters of their acceptance and their session day/time by June 15.
16. Prepares publicity for your conference:
  - a. Conference advertisement to be submitted to appropriate journals and other publications in timely manner; determine CLADEA agreements, and arrange with the Treasurer for any payments.
  - b. Listing of conference sessions and institutes to appear on website well before conference registration;
  - c. Call to Conference and “Sneak Preview” advertising the conference to be sent to members and others;
  - d. Column for each issue of *NewsNotes*.
17. With Executive Director and management company personnel works with Mobile App Events Chair to get the program loaded by early fall.
18. Work with Exhibits Chair to coordinate advertisement for exhibitors and other companies in Guidebook.
19. Coordinate program preparation with On-site activities. Plan for extra days before and/or during the spring board meeting to meet with on-site committees and hotel personnel.
20. Works with the Mobile App Events Chair to review the online conference evaluation and session evaluations which are accessed through a link.

### **After the Conclusion of the Annual Conference You Served as Co-Chair**

[Note: At this point, the Past President has technically transitioned off the CRLA Board; however, their Conference Chair responsibilities do not end until the below items have been completed.]

1. Prepares report by given deadline itemizing expenditures of funds from conference budget.
2. Writes a Conference Chair Report and collects conference reports from each of the Conference Committee Chairs, including a Registrar report from the Executive Director, and forwards them

to the Board by the given deadline after the management company has finalized conference financials.

### **General Responsibilities of all CRLA Board members**

1. Maintains current membership in CRLA throughout term of office.
2. Attends all CRLA Board Meetings:
  - a. Annual conference meetings before and after the conference;
    - b. On-site Conference meeting in the spring;
    - c. Monthly online meetings;
    - d. Any other assigned meetings such as a retreat
3. Attends all CRLA Conferences which includes special conference events and the annual business meeting.
4. Provides input into agendas, policies, procedures, discussions, appointments, and reports.
5. Submits an annual report by September 30th of each year.
6. Attends assigned conferences or meetings as approved by the CRLA Board.
7. Submits copies of appropriate correspondence or reports to the archives (as determined by official CRLA policy).
8. Signs a conflict of interest statement according to Article 5, Section 3 of the CRLA Bylaws and to be filed with the Secretary of CRLA.
9. Revises any suggested changes to job description during term and update job description at end of term. Provide to the CRLA Secretary.
10. Conducts other specific duties assigned by the Board.

### **Annual Budget Proposals**

The CRLA Executive Board discusses the upcoming fiscal year's budget. All Board members and CRLA leaders who are responsible for budget categories and/or individual items must submit a budget proposal each year for the upcoming year. **These budget proposals are due to the Treasurer *no less than one month before the date of the designated Board meeting.*** The Treasurer will reach out to all Board members, Chairs, and Coordinators, sharing previous budget information to help inform the new budget proposals. The Treasurer will share the deadline for submitting budget proposals well in advance of the date needed.

### **Reimbursement for Conference and Board Meeting Expenses**

- All reasonable transportation, hotel, meal expenses, and conference registration will be covered for the annual conference. This includes incoming Board members.
- Membership fees are the responsibility of each Board member and are not reimbursed by CRLA unless they are a lifetime member.
- All reasonable transportation, hotel, and meal expenses will be covered for travel on CRLA business such as attendance at state conferences, or sister organizations meetings.

### **Position Onboarding Requirements**

#### **Incoming Past President Responsibilities**

- Participates in conference calls during the months after election/appointment and prior to the annual conference, as schedule allows, to become familiar with topics facing the board and protocol for meetings.
- Becomes familiar with CRLA website and other relevant information concerning the Association.

- Attends the face-to-face Board meetings held the three days prior to the Annual Conference at the conference site—as requested by the CRLA Past President.
- Communicates with the current Past President concerning transfer of duties, including materials, reports, files, and procedures.
- Works with the outgoing Past President to ensure a smooth transfer of leadership; this should include monthly or regular phone/Zoom calls to discuss key job responsibilities and procedures.

### **Outgoing Past President Responsibilities**

- Once the incoming Past President has been elected or appointed, schedule regular or monthly meetings to discuss key job responsibilities and procedures and ensure a smooth transfer of leadership.
- Share and explain all relevant files, documents, etc. with the incoming Past President in advance of their taking office.
  - Provide the CRLA Policies and Procedures Manual to the incoming Past President and identify the areas that relate to the President’s role.

Accepting this position allows CRLA to publish name, work address, and work telephone number.

(Revised February 2001, December 2008, November 2012 (added Bylaws Chair), November 2014; November 2016; November 2017; October 2019)