



# How To Lead A President's Planning Day

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Aggie Mom University

**Determine that the thing  
can and shall be done and  
then we shall find the way.**

— Abraham Lincoln



# Agenda

- ✓ Why A President's Planning Day Is Good Leadership
- ✓ Overview of a President's Planning Day
- ✓ President's Planning Day Agenda
- ✓ Identify goals/vision for the year
- ✓ Create a plan to execute your goals



# Why Have A President's Planning Day? - CORE

**C** Start the year by **COMMUNICATING** your goals/vision

**O** Getting **ORGANIZED** early is key to successful execution

**R** Build **RELATIONSHIPS** with your board and members

**E** Set **EXPECTATIONS** for your board

- ✓ What they do in their role
- ✓ What you want them to achieve

# Overview of a President's Planning Day

## **Overview**

It's an all-day activity (normally Saturday) where you meet and bond with your Board. Discussions include meeting dates, club emails, money procedures, board report due dates, board business process, plan for the year, expectations, communications, etc.

## **Location:**

In your home, at your local library, or wherever you can find a space where you can set up tables, have discussions, etc.

## **Food:**

You should have lunch brought in so the board can spend time and chat and get to know each other. Normally, food is organized by you or your secretary, funds are collected from individual board members for lunch.

## **Ice Breakers:**

This is a great way to break up business and have a little fun!

## **Transitions:**

Make sure all the positions on the board have been transitioned properly (Transition checklist included with this presentation). They have the info and tools they need from their predecessors.

# President's Planning Day Agenda (Sample)

## **Call meeting to order**

All meetings must be called to order and adjourned according to parliamentary procedure.

## **Invocation (optional)**

Invocation is prayer delivered for the meeting, normally done by VP, President Elect, or anyone designated by President.

## **Establish Quorum**

Your bylaws will tell you how many voting board members must be in attendance to establish quorum. Non-voting board members cannot be used to establish quorum.

## **Adoption of Agenda**

The agenda must be adopted as an order of business. Commonly done by saying “The agenda for this meeting has been printed and is on the table in front of you. Are there any objections to the agenda? Hearing none, the agenda is approved as presented.” NOTE: You only conduct business that is on the approved agenda.

## **Welcome from President**

Welcome everyone and let them know how appreciative you are of their service. Having fun during the year and building relationships is important for success.

# President's Planning Day Agenda (Sample cont'd)

## **Approval of minutes from last meeting**

Minutes must be approved so they stand as a formal record of the decisions made and actions taken at the prior meeting.

## **Treasurer's Report**

## **Board Business Process**

How business will be conducted your year. If you want emails answered within 3 days, make that known. If everyone must get approval before spending money let them know. People should understand how to make a motion, how to table a motion, and how to call the question. If you do not have a Parliamentarian, invest in Robert's Rule of Order Newly Revised and learn the basics. Reach out to the Federation Parliamentarian as needed.

## **New Business**

Any new business that should be discussed by the board. (Tax-free days, budget, fundraisers, etc.)

## **Unfinished Business**

Any business that was tabled from the previous board meeting.

## **Officer Reports**

All officers should give an update to their reports if it is pertinent to the board. Normally there is a 3 minute limit for each position to give any updates not mentioned in the report they submitted to the President.

## **Adjourn**



Austin Aggie Mothers' Club

Presidents Planning Meeting- May 2019

Agenda

1. Call meeting to order and Welcome!
2. Establish Quorum
3. Invocation
4. Sign in sheet
5. Introductions
6. Approve minutes.
7. Bylaws
8. Mission Statement Review
9. Reports:
  - Treasurer Report:
    - ❖ Financial Report
    - ❖ Tax Free Days – Vote to approve
    - ❖ Approve Budget for the year
    - ❖ Review Money procedures and forms
  - Officer Reports:
    - ❖ Please share information not on your Board report
  - President Report:
    - ❖ Review of dates for the year: General/Board meetings, speakers, socials, fundraisers, Board Report due dates.
    - ❖ Club emails and passwords/Storing documents in Google Drive.
    - ❖ Seating at Meetings: Spread out
    - ❖ Federation August Weekend
10. Howdy Social Committee
11. Confidentiality
12. Other business
13. Adjourn



**GALVESTON COUNTY**  
**AGGIE MOMS**

Presidents Planning Day

Saturday July 25, 2020

Agenda

1:00 pm	I. Call to order - President, Lydia Wharton
	II. Invocation - Treasurer, Mechelle Fisher
	III. Roll call - Patti Hankins, Secretary
	IV. Adoption of the Agenda with flexibility - President, Lydia Wharton
	V. Welcome and Presidents Goals - President, Lydia Wharton
1:20	VI. Approval of minutes from the July 5th Executive meeting - President, Lydia Wharton
1:25	VII. Treasurer's report - Treasurer, Mechelle Fisher
1:35	VIII. Board Business Process - Libbey Franklin, 6th VP Historian
1:55	IX. New Business <ul style="list-style-type: none"> <li>A. Tax Free days for 2020 and 2021- Treasurer, Mechelle Fisher</li> <li>B. Board Business Process - Libbey Franklin, 6th VP Historian</li> <li>C. GCAM and TAMUG 60th Anniversary Celebration - President, Lydia Wharton</li> </ul>
2:04	X. Unfinished business and General Orders <ul style="list-style-type: none"> <li>A. Howdy Party - 2nd VP Programs, Brenda Gouthier</li> </ul>
2:09	XI. Officer Reports - Various chairs (Additions or corrections to the report on the google drive document sent to be filled out on July 22)
2:24	XII. Adjourn



# Discuss Your Goals for the Year

- ✓ Make sure you are prepared to discuss your goals (How, What, Why). You cannot expect people to get excited about your goals if they don't know what they are. You need your team to help you reach the goals you have set, it's your job to explain your goals clearly and get buy-in from your board.
- ✓ Have them distributed to the board so they can be discussed.
- ✓ Come with an open mind to hear opinions and/or objections to them. Your job is to SELL your goals to your Board, so they understand your vision.
- ✓ Give them a reminder about achieving goals. My year as Federation President, I gave all 24 board members a little rubber duck and told them to remember to “keep your ducks in a row.” What I meant by this was make sure you did your job well.
- ✓ Show them you are excited and passionate about being their President. It's an honor to lead, make sure you demonstrate that.

# Identify Your Goals/Vision

*Spend time thinking about what you would like to accomplish for your club.*

Just as importantly, think about ways you can leave the club in better shape than you found it. Many times, goals are set by identifying problems that need to be solved.

Here are a few ideas:

- ✓ Do you want to increase membership?
- ✓ Raise more money?
- ✓ Create a better culture?
- ✓ Get more training?
- ✓ Increase awareness about your club and what Aggie Moms do?

**THINK BIG** but *start small*.

You can have a lot of ideas but start with the top 1 or 2 to keep it manageable.

These goals should:

- ✓ Make a significant impact on the club and help advance the mission
- ✓ Be challenging but achievable
- ✓ Be goals you are passionate about

# Roadmap to Identify Your Goals/Vision

What are 3 things (or more) you think need to be improved in your club? Identify as many issues as you can. (**THINK BIG**)

Rank those in order of importance.

Pick what you think is the most important issue that needs to be addressed.

Determine if that issue should be the sole thing you focus on, or if there is room for another. If so, add it. (**Start small**).

For example, let's say you identify the following:

- #1 Struggling to find people to step up for positions
- #2 Declining membership/meeting attendance

# Create An Action Plan For Your Goals/Vision

Once you've identified your top 1, 2 or 3 goals you'll need a *plan to execute* them. (You can have the best ideas in the world but if you can't put them into action, it won't matter).

Here some tips on how to create a plan:

- ✓ You may want to try the SMART format (Specific, Measurable, Attainable, Relevant, Time-based)
- ✓ Create a list of actions/tasks to reach goal
- ✓ Set a timeline for each task. This isn't as daunting as it seems, it gives you a roadmap for your process
- ✓ Designate resources – assign tasks to people along the timeline
- ✓ Be prepared to discuss your action plan during PPD for feedback, alternate ideas, etc.
- ✓ Once consensus is reached, update your plan and send it out to board
- ✓ Monitor progress

Your plan does not have to be complicated. It can be as simple as creating a list in a word document with bullet points underneath.

# Template For Creating A Plan – SMART Goals

Consider using the SMART outline

**S**pecific                      For example “I want to increase membership by 25%”

**M**easurable                  Have membership give you a report each month for tracking to see if you’re on track

**A**ttainable                    Make sure the goals are reasonable

**R**elevant                      Your goals should be relevant to the needs, abilities and interests of the club.

**T**ime-based                    Set a specific deadline for reaching goal (like increase of 10% by first meeting and 25% by EOY).

# Template For Creating A Plan – List of Actions

Create step by step actions by breaking up the main goal into smaller objectives. Take an objective then break it down into bullet points. Do this until you've listed all the objectives. Remember to think also about monitoring progress and following up with action items that come from your monitoring.

For example: increasing membership (through marketing):

*How do I get the word out (market) to moms with new or current students?*

- ✓ Identify new and current students by requesting EIS list from TAMU  
<https://hosting.aggienetwork.com/newaccount/officer-emails/>
- ✓ Send post cards to addresses in EIS list – for meetings or Howdy Moms social
- ✓ Plan a “Howdy Moms” social event in person or on Zoom or both
- ✓ Post in Aggie Parents FB groups
- ✓ Ask your members to bring an Aggie Mom they know to meeting, events, etc.

# Template For Creating A Plan – Timeline

Set a timeline for the actions/tasks. Always be aware of approaching deadlines for things so you can keep your plan on track.

If you want to increase membership, then marketing and spreading the word before your first meeting in August/September is very important.

Identify those dates that will impact your goal and account for them in your plan.

You want to try and maintain consistent progress towards your goal. An early start will help you gain momentum to carry you through the holidays in Nov/Dec when things slow down.

# Template For Creating A Plan – Designate Resources

Although you're the one that's developed the plan as President, your job is to designate resources to carry it out.

All positions on your board, as well as your members, should be helping reach these goals. Do not assume people know what to do, it is YOUR job to lead them.

Making sure everyone understands the goal(s) and what their role is makes success much easier. Here's an example from the previous slide on marketing to new moms:

- ✓ For example – members will reach out to those new Aggie Moms and invite them to meetings
- ✓ Membership – will go to <https://aggiemoms.org/eislistprogram/> and request the list as well as information on printing labels from TAMU
- ✓ Secretary/Socials – will work with President to plan ‘Howdy Moms’ event, send out invites, post on social media, etc.
- ✓ Treasurer – will make sure funds are available for the event



# Template For Creating A Plan – Monitor Progress

How will you make sure things get completed on time? You must be purposeful in managing the resources you've assigned to tasks in your plan.

- ✓ Have your resources report back to you on progress or roadblocks that they need your help solving.
- ✓ If progress slows or is not being made, work with the resource to understand why. It may be something that you need to step in and help with. Perhaps there is a personal issue or work demands on her time that will require more resources. Perhaps the approach isn't working, and you'll need to reevaluate. Maybe you reach out to another Aggie Mom club or the Federation for assistance. Whatever you need to do to get your progress back on track.
- ✓ You have one year to reach your goal, so time is of the essence always.

# Q & A