**Get Ready: Before Your Term Begins**

* Meet with the current VP of administration to discuss the responsibilities, standard operating procedures, resources, and best practices for the role. Review their contributions over the past year, progress toward annual goals, and ideas for the future.
	+ Materials to review: [position description](http://files.astd.org/ChapterServices/%21CLC%20New%20Website/Resources/Toolkits/Resources%20By%20Leadership%20Position%20Toolkit/ATDChapterAdminSecretary.doc?_ga=2.126914573.1837891381.1544452308-1106022880.1509126965), board member contact information, standard operating procedures, role-specific resources
* Mark your calendar for upcoming board meetings and important chapter events.
	+ Materials to review: chapter website and shared calendar
* Learn about the website and membership management platform(s) the chapter currently uses.
	+ Materials to review: [Wild Apricot Partnership webpage](https://www.td.org/chapters/clc/wild-apricot-partnership), [Wild Apricot Help webpage](https://gethelp.wildapricot.com/en)
* Brainstorm ideas for the year ahead and think about what impact you hope to have on the chapter.

**Get Set: The First 30 Days**

* Meet with the board to learn more about the chapter’s mission and vision, health, and operational plan.
	+ Materials to review: chapter mission and vision, chapter health dashboard, chapter operational plan
* Review the board’s policies, procedures, and communication tools and familiarize yourself with the expectations of individual board members.
	+ Materials to review: board policies and procedures, communication tools
* Complete the Chapter Leader Onboarding Checklist to learn about ATD and the resources available for ATD chapter leaders. Connect with your Chapter Relations Manager (CRM) and National Advisor for Chapters (NAC) to share questions and discover best practices.
	+ Materials to review: [Chapter Leader Onboarding Checklist](http://files.astd.org.s3.amazonaws.com/ChapterServices/%21CLC%20New%20Website/Chapter%20Administration%20Landing%20Page/Board%20Development/Chapter%20Leader%20Onboarding%20Checklist.pdf?_ga=2.9486963.754894907.1543940307-1106022880.1509126965), [CRM contact information](http://www.td.org/crm), [NAC contact information](http://www.td.org/nac)
* Review the Chapter Affiliation Requirements (CARE) and take note of administrative activities that you will need to complete throughout the year.
	+ Materials to review: [CARE webpage](https://www.td.org/chapters/clc/care), [CARE Element Matrix](https://www.td.org/chapters/clc/care/element-matrix)
* Record minutes at chapter board meetings and ensure they are made available to the membership.
	+ Materials to review: board meeting minutes, process for posting meeting minutes
* Maintain an updated repository of the chapter’s governing documents, including any state and federal filings the chapter submits.
	+ Materials to review: chapter bylaws, annual nonprofit corporation filings (if applicable), state and federal tax filings, [Chapter Finance Toolkit](http://files.astd.org/ChapterServices/%21CLC%20New%20Website/Resources/Toolkits/Finance_Toolkit_2017.pdf?_ga=2.63502383.1837891381.1544452308-1106022880.1509126965)
* Prepare to complete or update a risk management assessment for the chapter.
	+ Materials to review: [Chapter Risk Assessment Guide](http://files.astd.org/ChapterServices/Toolkits/Chapter%20Risk%20Assessment%20Guide%202015.pdf?_ga=2.139116211.1837891381.1544452308-1106022880.1509126965)
* Review Sharing Our Success (SOS) submissions related to administration to identify best practices that you can implement at your chapter.
	+ Materials to review: [Administration SOS Submissions webpage](https://www.td.org/chapters/clc/sos/sos-all/administration)
* Contact the chapter’s Chapter Relations Manager (CRM) as changes occur to the chapter’s board roster.
	+ Materials to review: [CRM contact information](http://www.td.org/crm)

**Go: 60 Days In**