**Get Ready: Before Your Term Begins**

* Meet with the current president 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/ATDChapterPresident.doc?_ga=2.106025603.1837891381.1544452308-1106022880.1509126965), 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
* Review the strategic planning resources available through ATD.
  + Materials to review: [Change Agility Session Toolkit](http://files.astd.org.s3.amazonaws.com/ChapterServices/%21CLC%20New%20Website/Resources/Toolkits/Change%20Agility%20Session%20Design%20Guide_edited.pdf?_ga=2.210499221.1837891381.1544452308-1106022880.1509126965)
* Schedule regular check-ins with the incoming president-elect to review the responsibilities, standard operating procedures, resources, and best practices for the role.
  + Materials to review: [position description](http://files.astd.org/ChapterServices/%21CLC%20New%20Website/Resources/Toolkits/Resources%20By%20Leadership%20Position%20Toolkit/ATDPresidentElect.doc?_ga=2.168335265.1837891381.1544452308-1106022880.1509126965), board member contact information, standard operating procedures, role-specific resources
* 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 share information about the chapter’s mission and vision, health, and operational plan.
  + Materials to review: chapter mission and vision, chapter health dashboard, chapter operational plan
* Discuss the board’s policies, procedures, and communication tools and review the expectations of individual board members.
  + Materials to review: board policies and procedures, communication tools
* Review the Chapter Affiliation Requirements (CARE) to learn about activities the chapter will need to complete and data it will need to track 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)
* Explore the board development resources available through ATD and pass them along to chapter leaders. Schedule regular check-ins to share feedback and address challenges.
  + Materials to review: [ATD Chapter Leaders Conference (ALC)](https://www.td.org/chapters/clc/atd-chapter-leaders-conference-alc), [Chapter Leader Day](https://www.td.org/chapters/clc/chapter-leader-day), [ATD Committees-at-a-Glance Document](http://files.astd.org/ChapterServices/%21CLC%20New%20Website/Resources/National%20Advisors%20for%20Chapters/2015/AtAGlanceChapterRelatedNationalCommittees2016.pdf?_ga=2.67812369.1837891381.1544452308-1106022880.1509126965), [Business Acumen Development](http://files.astd.org/ChapterServices/%21CLC%20New%20Website/Chapter%20Administration%20Landing%20Page/CARE/Business%20Acumen%20Assessment_Final_2015.pdf?_ga=2.129734668.1837891381.1544452308-1106022880.1509126965), [Succession Planning Toolkit](http://files.astd.org/ChapterServices/%21CLC%20New%20Website/Chapter%20Administration%20Landing%20Page/Board%20Development/Succession%20Planning%20Toolkit/SuccessionPlanningToolkit2015.pdf?_ga=2.129734668.1837891381.1544452308-1106022880.1509126965)

**Go: 60 Days In**

* Record and analyze chapter data to assess the chapter’s progress toward its operational goals.
  + Materials to review: chapter data and dashboards
* Connect with the VP of administration to review the chapter’s governing documents, including any annual filings the chapter is required to submit.
  + 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)
* 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)