

# Chapter Leader Success Series Role-specific Onboarding

President Role  
October 28, 2024

# Agenda

- Welcome/Agenda
- Role-Specific Resources
- Panel Introduction & Discussion
- Large Group Discussion



Sarah Schillen, MA, CPTD

Home Chapter: Puget Sound

National Advisor for Chapters (NAC)  
supporting:

Chapters: Austin, Brazos Valley, Dallas, Fort Worth/Mid-Cities, Houston, San Antonio

<https://www.td.org/chapters/clc/nac>



# ROLE-BASED RESOURCES

---

President/Governance

# CARE Resources

## CARE Element Matrix Foundational

CARE Foundational Element	Why	How
<b>BOARD OF DIRECTORS</b>		
<p>The chapter board meets at least once per quarter and makes meeting minutes available to members.</p>	<p>Board meetings are the time and place for chapter leaders to monitor the chapter’s financial situation, address chapter issues, agree upon solutions, communicate the status of ongoing projects, and develop future chapter leaders. Since the board makes legally binding decisions for the chapter, it is a good practice for leaders to share the results of these meetings with chapter members. This builds members’ trust and gives them an opportunity to engage in chapter activities, including volunteering.</p>	<p><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>• Organize board meetings via these venues:               <ul style="list-style-type: none"> <li>• in person (recommended)</li> <li>• virtual (conference call, web conferencing, among other ways).</li> </ul> </li> <li>• Maximize meeting effectiveness by following standard meeting guidelines such as using an agenda, establishing timeframes, and encouraging contribution for instance.</li> <li>• Capture minutes and share with members how meeting minutes can be accessed. Minutes may share key decisions and actions rather than detailed minutes of who said what.</li> </ul> <p><b>Samples from other chapters:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">New York City: Board Meeting Position Status Report SOS</a> with <a href="#">Minutes Template</a> and <a href="#">Status Report Template</a></li> <li>• <a href="#">Tulsa Board Meeting Minutes</a></li> <li>• <a href="#">Valley of the Sun: Board Meeting Minutes Collaboration</a></li> </ul>
<p>The chapter submits a current board roster in Excel with CARE submission and updates ATD Chapter Services as changes occur.</p>	<p>Providing a current board roster as well as updates when changes occur helps build a connected ATD community. This allows for the dissemination of information about programs, initiatives, and resources to all chapter leaders. These volunteers</p>	<p><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>• Submit a current chapter board roster to ATD Chapter Services using the MS Excel board roster template available at <a href="http://td.org/CARE">td.org/CARE</a>.</li> <li>• If any changes occur during the year, resubmit an updated Excel version directly to your <a href="#">chapter relations manager</a> (CRM).</li> <li>• Include with the roster information:               <ol style="list-style-type: none"> <li>1. ATD member ID (if available)</li> </ol> </li> </ul>



# CARE Resources

## CARE Element Matrix Foundational

GOVERNANCE		
<p>The chapter creates an operational plan that includes but is not limited to:</p> <ul style="list-style-type: none"> <li>• annual goals</li> <li>• communication and marketing strategies</li> <li>• recruitment and retention strategies</li> <li>• a succession planning strategy.</li> </ul>	<p>The chapter operational plan provides a framework for doing business effectively and managing resources efficiently. It states how the chapter will achieve outlined goals and objectives so that chapter activities are consistent and target member needs. It outlines how board members will share information with each other and with their stakeholders. By documenting recruitment and retention and succession planning strategies, chapter leaders are providing the framework needed for chapter growth and sustainability. The operational plan also provides a clear reference point to evaluate and redirect chapter efforts as needed.</p>	<p><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>• Identify the objectives, tasks, and timelines associated with each annual goal and major strategy area based on member needs.</li> <li>• Annually review and update, if necessary, your operational plan to ensure it aligns with the chapter’s mission and vision.</li> <li>• Use the operational plan to identify how the chapter will address CARE elements throughout the year.</li> </ul> <p><b>Where can I go for additional information?</b></p> <ul style="list-style-type: none"> <li>• <a href="#">ATD Operational Plan Template</a></li> </ul> <p><b>Samples from other chapters:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Central Massachusetts’s Operational Plan</a></li> <li>• <a href="#">Detroit’s Operational Plan</a></li> <li>• <a href="#">San Diego’s Operational Plan</a></li> <li>• <a href="#">West Virginia’s Operational Plan</a></li> </ul>
<p>The chapter’s mission, vision, and bylaws align with those of ATD. Additionally, the chapter meets the ATD brand identity guidelines.</p> <p>*The chapter may also maintain transparency by making board meeting minutes and summaries available to members.</p>	<p>The chapter’s definition of its purpose as well as its governing policies should align with those of ATD.</p> <p>Meeting the ATD brand guidelines protects brand integrity and creates a consistent and professional presentation of the ATD name and logo. When a brand is perceived as having consistent value and integrity, it makes it easier for the organization to gain and retain members and partners.</p>	<p><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>• Review the chapter’s mission and vision to ensure its alignment to ATD.</li> <li>• Review the chapter’s bylaws on an annual basis and make changes as appropriate.</li> <li>• Ensure all chapter operations reflect the processes documented in the bylaws.</li> <li>• Ensure all communication, hard copy and electronic, conform to ATD’s brand (logo) identity guidelines. Chapters must use their chapter-specific logo obtained from ATD in accordance with the instructions specified in ATD’s 2024 Logo and Graphic Standards for ATD Chapters.</li> <li>• Make board meeting minutes and summaries available to members.</li> <li>• Maintain and update SOPs annually or as needed throughout the year.</li> <li>• Ensure there is a central repository or document library for archiving important chapter documents.</li> </ul> <p><b>Where can I go for additional information?</b></p>

# SOS Categories & Examples

## Board of Directors

ATD Chapter Leader Conference (ALC)	Board Member Orientation	Board Recruitment Strategy	Strategic Planning
Process for ALC Sponsorship, Nebraska, 2018	Board Member Technology Onboarding, Metro DC, 2021	Vetting Process for Board Members, Chattanooga, 2017	Templates for strategic planning with CARE, Research Triangle Area, 2021
Board Meetings	Chapter Volunteer and Board Position Descriptions	Past President Engagement	Succession Planning
Board Meeting Position Status Report Templates, New York City, 2018	Roles and Responsibilities Connected to CARE, Greater Las Vegas, 2017	The President's Council, Baton Rouge, 2009	Developing Succession Planning Fluency in The Board of Directors, Puget Sound, 2022

# SOS Categories & Examples

## Governance

Board Selection and Elections	Chapter Operating Plan	Measuring Success	Standard Operating Procedures
Interview Guides for Board Roles, New York City, 2018	Chapter Operational Plan, Greater Boston, 2012	Data-Driven Chapter Governance (Wild Apricot, Power BI, and Business Intelligence Dashboards), Southeastern Wisconsin, 2022	Making VP of Finance “EZ” – SOP for Filing 990-N and 990-EZ Tax Returns, South Carolina, 2021
Central Repository	Governing Documents	Risk Assessment	
The Way We Were: Capturing & Archiving Your Chapter’s History, Baton Rouge, 2018	Developing a Culture of Sharing our Success (SOS), Florida Suncoast, 2016	Risk Management, San Diego, 2011	

# Chapter Leader Community (CLC)

Learn | Share | Succeed

Find a topic quickly with the [short links map](#) or use the navigational sections below. Questions, view the [chapter leader FAQs](#).

## Updated Chapter Logos, Templates, and Branding Guide Available Now

During ATD's Annual Membership meeting, Tony Bingham announced that **ATD is changing its logo colors—to blue and green**. Updated materials are now available to chapters, including updated logos, templates, and a new branding guide. **Chapters have one year, until May 15, 2025 to transition to the new brand.**



ATD offers professional development opportunities and resources for chapter leaders. Learn about chapter-related national committee opportunities and attend events specifically for chapter leaders, such as the ATD Leadership Conference (ALC) and Chapter Leader Day at the annual International Conference & Exposition.

- **Chapter Board Development**

Explore resources designed to provide board members with tools to flourish in their positions.

- **Chapter Webinars**

Watch free webcasts that focus on leadership, management, and growth.

- **ATD Chapter Leaders Conference (ALC)**

Come to an annual conference designed exclusively for ATD chapter leaders! Current and incoming board members are invited to network with fellow chapter leaders and share best practices for running an ATD chapter.

- **ATD Chapter Leaders Conference Program Advisory Committee (ALC PAC)**

The ALC PAC, a national advisory committee composed of chapter leaders, works with ATD staff to develop and execute the annual ATD Chapter Leaders Conference (ALC).

- **Chapter Recognition Committee (CRC)**

The CRC, an ATD advisory committee composed of chapter leaders, is charged with identifying, recognizing, and sharing chapter best practices.

<https://www.td.org/chapters/clc>

## Board Development

*Learn how your chapter can succeed, inspire, and grow through strong chapter administration and leadership. Access essential chapter and board development tools to take your chapter to the next level.*

### Chapter Leader Position Description Samples

Select a leadership position below to view a sample position description as well as links to resources and toolkits that will help you in your leadership role.

## Additional Board Development Resources

TOPIC	DESCRIPTION
<a href="#">First 90 Days Chapter Leader Guide</a>	This guide is intended to support your leadership journey to ensure chapter success.
Business Acumen Development	This skill assessment is an opportunity for your chapter board to individually assess and get feedback on the specific abilities, knowledge, and behaviors that exemplify business acumen. In addition to being an assessment, this provides a positive model of what your chapter should look for in a potential chapter leaders.
<a href="#">Chapter Finance Toolkit</a>	Designed as a resource for a chapter finance officer, provides important information and advice on typical CFO responsibilities.
<a href="#">990 Filing Information</a>	The guide provides information on filing a 990 or 990-N for the chapter.
<a href="#">Chapter Leader Onboarding Checklist</a>	Review the Chapter Leader Onboarding Checklist to learn about the resources that will support your success as a new chapter leader.
<a href="#">Chapter Risk Assessment Guide</a>	Designed to be used by chapter board members to evaluate risk and determine strategies for mitigation.
<a href="#">Chapter Success Series Resources</a>	Curated resources to help support foundational chapter function.
<a href="#">Convince Your Boss</a>	Customize this letter to help your boss understand how supporting your involvement with your local chapter can build your skills as a talent development professional and reap benefits for your organization. Use this letter to help your boss understand how attending ALC will support your professional development and improve your job performance.
Group Tax Exemption Information	Information on the benefits of participating in ATD Group Tax Exemption as well as how to apply for inclusion.

# NEW Resource!

## Additional Board Development Resources

TOPIC	DESCRIPTION
<a href="#">First 90 Days Chapter Leader Guide</a>	This guide is intended to support your leadership journey to ensure chapter success.

Are you new to running a chapter? This resource is for you! We have created a checklist to help you get organized and stay on track.

## Getting Started Leading Your ATD Chapter: First 90 Days



Congratulations, and thank you for serving your ATD chapter! This guide is intended to support your leadership journey to ensure chapter success.

### First 30 Days:

Running a chapter and learning the ins and outs can be overwhelming if you let it (or if you try to do it on your own). Leverage this list of suggested actions and resources to build a strong foundation as you get started. If you sail through the First 30 Days suggested actions, it is not too early to begin chipping away at the remaining suggestions for days 30–90 as outlined below.

### Getting Started:

- Get the chapter logins and passwords to all accounts—update them if necessary.
- Change signatories with chapter bank account (if applicable). It is recommended that there are always a minimum of two signatories on any account.

Learn how your chapter can succeed, inspire, and grow through strong chapter administration and leadership. Access essential chapter and board development tools to take your chapter to the next level.

- **ATD Education/Chapter Partnership Program**

Promote upcoming certificate programs and earn CHIP revenue. Chapters may also be eligible to receive a complimentary registration to local programs.

- **Wild Apricot Partnership**

A partnership with Wild Apricot is available to provide membership, website, and event management services to chapters at a discounted rate.

- **Toolkits**

Toolkits should be disseminated to chapter leaders responsible for that functional area throughout the year and when new information becomes available.

# President Toolkits (CLC)

Resource	Description / Why	What	Questions to answer
<a href="#">DEI Toolkit</a>	To assist ATD Chapter Leaders in discovering ways to incorporate DEI in all aspects of chapter operations.	Resources for approaching DEI work in chapter operations to assist your board in navigating discussions, identifying areas of opportunity, determining needs and setting DEI goals.	<ul style="list-style-type: none"> <li>• Where do we start?</li> <li>• What more can we be doing to enhance our DEI efforts?</li> </ul>
<a href="#">Chapter Risk Assessment Guide</a>	To stimulate thinking among the leaders of your chapter about best practices regarding the reduction of risk for your chapter, its leaders and its members.	To help your board conduct a risk assessment for your chapter	<ul style="list-style-type: none"> <li>• What risks are we unaware of today?</li> <li>• How can we proactively mitigate potential risks by being aware and informed?</li> <li>• What actions should be taking today to ensure the short- and long-term health and success of our chapter?</li> </ul>
<a href="#">Succession Planning Toolkit</a>	To help your chapter evaluate its future leadership and talent needs, identify individuals who can potentially satisfy those needs, and prepare an individual for her eventual role as a leader.	Succession Planning Best Practices, Talent Acquisition tips, Interviewing Best Practices including sample interview structure and questions, preparing and developing potential leaders and onboarding tips	<ul style="list-style-type: none"> <li>• How do I create a succession plan?</li> <li>• What is an optimal annual recruiting schedule?</li> <li>• What are some best practices for managing transitions?</li> </ul>





Membership

Board Development

Communications & Marketing

Succession Planning

Succession planning describes the ongoing process of identifying and developing candidates for key chapter leadership positions to ensure the sustainability of the chapter. Review the available resources to support your chapter's efforts to build a leadership pipeline and prepare for unexpected vacancies.

- **Recruitment**

Effective recruitment strategies can support your efforts to grow chapter membership, engage new volunteers, and attract chapter leaders.

- **Onboarding & Succession Planning Resources**

Onboarding is an opportunity for chapters to orient incoming board members to their roles, educate them about responsibilities and expectations, and familiarize them with the resources available to chapter leaders.

A group of five people are seated on a stage for a panel discussion. From left to right: a man in a green sweater, a man in a grey hoodie and tan cap, a woman in a plaid shirt and glasses holding a microphone, a man in a denim vest, and a man in a plaid shirt. The woman in the center is speaking into a microphone. The background is a dark wall with a whiteboard on the left.

# PANEL DISCUSSION

---

President/Governance

# Welcome Panelists!



Eric Atkins

President Birmingham Chapter 2024

National Advisor for Chapters (NAC) (2021-2023)

President 2018  
VP of Finance 2017  
VP Programs 2016



Dana Devlin

President Dallas Chapter 2023/2024

President Elect 2022  
Southwest Learning Summit - Co-chair (2022),  
Emcee/Main Stage Production (2016-2020), Co-  
chair (2017), Mentor (2014-2016), Chair (2013)  
AXIS Awards - Judge (2021), Emcee/Master of  
Ceremonies (2016-2019)



David Jarvis

President Central Indiana Chapter 2024

VP Programs x 2 years. 2022-2023  
President Elect, 2023  
President, 2024  
Past President, 2025

ATD National Chapter Recognition  
Committee, 2023-2024





# LARGE GROUP DISCUSSIONS

President/Governance

Be creative



**WHAT ARE YOUR  
BIGGEST HOPES  
AND CONCERNS AS  
YOU STEP INTO  
THE ROLE OF  
PRESIDENT? (IN  
CHAT RELEASE  
YOUR CONCERNS,  
COME OFF MUTE  
TO SHARE YOUR  
HOPES)**





**HOW DO YOU  
ENVISION YOUR  
CHAPTER  
EVOLVING OVER  
THE NEXT YEAR?  
WHAT DO YOU  
NEED TO  
ACCOMPLISH  
STRATEGICALLY AS  
A BOARD?**

**WHAT ARE YOUR  
PLANS FOR  
FOSTERING  
COLLABORATION  
AND  
COMMUNICATION  
AMONG THE  
BOARD MEMBERS?**







**ANY QUESTIONS  
TO DISCUSS?**

# Q&A

