**Get Ready: Before Your Term Begins**

* Meet with the current VP of technology 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/ATDChapterTechnology.doc?_ga=2.206830611.1837891381.1544452308-1106022880.1509126965), 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/or 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)
* Learn about other technologies or software the chapter is using, such as those that support team collaboration, marketing, or virtual programming.
  + Materials to review: additional technologies or software
* 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) to learn about the communication activities the chapter 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)
* Audit the chapter’s website to identify and address outdated information about chapter membership and events as well as ATD membership and events.
  + Materials to review: chapter website, [Power Membership Resources webpage](https://www.td.org/chapters/clc/powermembership), [ATD conferences webpage](https://www.td.org/events/us-conferences)

**Go: 60 Days In**

* Assess how the board is currently using technology to collaborate and how the chapter’s technology supports the membership. Identify challenges and areas for improvement while exploring new tools that might alleviate or solve these problems.
  + Materials to review: chapter website, additional technologies or software, [TechSoup](https://www.techsoup.org/)
* Review Sharing Our Success (SOS) submissions related to administration and communication to identify best practices that you can implement at your chapter.
  + Materials to review: [Administration](https://www.td.org/chapters/clc/sos/sos-all/administration) and [Communication](https://www.td.org/chapters/clc/sos/sos-all/communication) SOS Submissions webpage