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.

- Identify or determine your volunteers' primary method of communication (i.e., email, Slack, text, other).

- Meet the board and learn the basics about each function.

- Schedule regular 1:1s (one-on-one meetings) with your predecessor (immediate past president for your chapter).

- Request to join the Chapter Leader LinkedIn Community.

- [Meet your NAC](#) (national advisor for chapters); add your chapter area calls to your calendar. Attend these calls!

Crucial Foundations:

- Review your bylaws to ensure your decision making and governance are in line with your chapter's established procedures; familiarize yourself with these practices:

  - Board meeting frequency

  - Voting quorum requirements

  - Fiscal year term

  - Election procedures and vacancies

- Review your financial reports and tax filing requirements along with your existing budget. Ensure an up-to-date budget exists.

- Review your chapter's CARE (Chapter Affiliation Requirements) status to ensure your chapter is positioned to maintain ATD chapter status. Familiarize yourself with ATD CARE performance guidelines. Create a strategic plan for achieving CARE.

Days 31-90:

Use the remainder of this guide to take inventory of your chapter's current situation and prioritize where you spend your energy and to what extent, based on your unique circumstances.

ATD Chapter Affiliation Requirements (CARE):

Maintaining Chapter Status (Chapter Affiliation Requirements):

- Learn about CARE, including the difference between CARE Foundational and CARE Plus.

- Learn your current CARE status and CARE history from your past president or CRM (ATD chapter relations manager).

- Work with your board to assess the CARE and CARE Plus elements, make a plan for achieving CARE, and determine the viability of aspiring to CARE Plus. It is recommended that this be a team exercise.

CARE Best Practices:

- Meet with CRM and NAC (know the difference).

- Schedule a one-hour intro call with your NAC.

  - [Find your current NAC here.](#)

- Add NAC area calls to your president and chapter calendars, and work with your board to have representation at each call as much as you are able (all board members are invited).

Finance and Legal:

Finance:

- Ensure your chapter is financially sound; build a strategy to maintain or improve financial health depending on the situation. Determine your available level of financial reserve (in months). Familiarize yourself with chapter finances. Know the revenue and expense cycle throughout the year.

- Review all contracts the chapter carries with outside vendors (including liability and D&O insurance).

- Know your chapter's fiscal year cycle.

Know Your Legal Status:

Confirm your chapter's legal status and understand the requirements to maintain it. Your chapter's (e.g., nonprofit) status may require you to take the following action:

- Know how your chapter is registered or incorporated within your state (ASTD vs. ATD).

- Review nonprofit regulations or requirements in your state and county (for legal nonprofit status). These requirements vary by state, hence the actions required also vary by state. Most states have a nonprofit association that can help with this, check with:

  o Your state's Division of Corporations (usually under the Commerce Dept.) (See Appendix A)

  o Your local Chamber of Commerce for links to a nonprofit association

  o The state attorney general's office or secretary of state office

Healthy Habits:

- Identify a healthy balance and approach to your volunteer commitment that will work best for you. For example: schedule your ATD hours and communicate them to the public, deciding to set a threshold of hours per week or complete ATD tasks and communicate in "cracks of time" during your workday. Find what works best for you; this will help you avoid burnout.

- Lead with intention; consider the impact of your words and decisions. Know that you are the role model for your organization and you set the tone, the culture, and the pace.

- Collaborate with your board to establish explicit ground rules and working agreements on communication, and how you will work together.

- Make decisions in a timely manner to unblock barriers as needed; empower your board members to make decisions as appropriate and to collaborate as needed. Acknowledge that you will need to be informed, but not necessarily be involved in every aspect of your chapter's operations.

- Lead with transparency; as much as possible without causing undue stress.

- Determine how you will create transparency and accountability for processes, interdependencies, workflows, and project work. Consider starting a Project Management Board (Trello, Asana, etc.) or find a collaboration tool that will meet your needs.

- Commit to checking your email daily and responding in a timely manner—keeping open communication channels and habits will help set your team up for success and keep the work flowing.

- Create avenues for feedback so that volunteers have a mechanism to get help if they need it.

- Ensure your programming is planned a minimum of three months in advance. If you need to buy some time, here is a tool to help you execute quick programming wins (*Resource:* 6-months Programming-in-a-Box).

- Spend time with your members and volunteers. Your volunteers are your greatest investment—upskilling them will create value.

- Connect with other chapter leaders. (If you need help doing this, reach out to your NAC and/or attend your chapter area call.) Prioritize attending ALC (ATD Chapter Leaders Conference) if possible.

Familiarize With ATD National Resources:

- Watch the [ATD Onboarding and Orientation webinar recording.](#)

- Save, refer to, and share the [ATD Chapter Leader Onboarding Checklist](#) as needed.

- Familiarize yourself with the [ATD CLC](#) (Chapter Leader Community), including role-based resources.

- Save and often refer to the [Key Dates Calendar.](#)

Strategic Operations and People Leadership:

Strategic Operations:

- Review your chapter's best practices and habits around your annual or bi-annual strategic leadership retreat. Plan and schedule this accordingly. Learn from past leaders and presidents what has worked well and what was less favorable.

- Use this planning session to optimize your team's focus and commitment to collaboration for the year. Locate or create a strategic plan with buy-in from board members. Leverage your chapter's annual survey data and communicate the chapter's strategic direction.

- Create focus for your board: define a priority for the year. Remember that your board's capacity is likely your limiting resource, so scale down your ideal version to something that you are 90 percent confident you can achieve. You can always stretch the goal later!

- Regularly discuss succession planning; day one is not too early to begin this work!

- Be realistic about what can be accomplished this year versus next year. Understand the capabilities and strengths of your volunteers as well as where your knowledge and skill gaps exist.

- Access and review or determine a plan to create operational documents (position descriptions, standard operating procedures (SOPS), etc.)

People Leadership:

- Meet with each board member 1:1 to discuss goals and existing operational plans. Review position descriptions and measures of success together (if they exist; if they don't, consider creating them). Leverage these 1:1s to begin to understand your chapter's current state in the following areas:

  o Finance: Review P&L (profit and loss) and bank statements to determine cash position, major bills and due dates, major sources of revenue and timing.

  o Membership: Review member rosters to determine number of active members, how renewals are spread through the year, and any key organizations. Determine the health of your Power membership metrics by reaching out to your CRM.

  o Programs: Review the programming calendar to determine typical cadence of events, how far in advance your calendar is planned, etc.

  o Understand the overall operations and infrastructure: what typically happens each month? What typically happens annually, and when during the year does it happen? Seek to understand all of the moving pieces.

  o Website: Learn about your chapter's website (Wild Apricot or other) and website administration. Determine the administrative access needed for your role and gain knowledge of how to accomplish important tasks as needed (i.e., change email templates, create events, emails, pull membership reports, etc.).

BE KIND TO YOURSELF AND OTHERS! HAVE FUN!

Appendix A

List of State Business Registration Sites
(usually State Department of Commerce)

Alabama: sos.alabama.gov/business-entities

Alaska: commerce.alaska.gov/web/cbpl/Corporations.aspx

Arizona: azsos.gov/business

Arkansas: sos.arkansas.gov/corporations/business-services

California: sos.ca.gov/business-programs/business-entities

Colorado: sos.state.co.us/pubs/business/main.html

Connecticut: portal.ct.gov/SOTS/Commercial-Recording/Commercial-Recording-Division

Delaware: corp.delaware.gov/

Florida: dos.myflorida.com/sunbiz/

Georgia: ecorp.sos.ga.gov/

Hawaii: cca.hawaii.gov/breg/

Idaho: sosbiz.idaho.gov/

Illinois: cyberdriveillinois.com/departments/business_services/

Indiana: in.gov/sos/business/index.htm

Iowa: sos.iowa.gov/business/

Kansas: sos.ks.gov/business/business.html

Kentucky: sos.ky.gov/business/business-filings/Pages/default.aspx

Louisiana: sos.la.gov/BusinessServices/Pages/default.aspx

Maine: maine.gov/sos/cec/corp/

Maryland: marylandbusinessexpress.org/

Massachusetts: sec.state.ma.us/cor/coridx.htm

Michigan: michigan.gov/lara/0,4601,7-154-89334_61343_35413---,00.html

Minnesota: sos.state.mn.us/business-liens/start-a-business/

Mississippi:
sos.ms.gov/business_services_business_entities_business_registration.aspx

Missouri: sos.mo.gov/business

Montana: sosmt.gov/business/

Nebraska: nebraska.gov/sos/business-services/

Nevada: nvsilverflume.gov/

New Hampshire: sos.nh.gov/corporate/soskb/corporate.asp

New Jersey: njportal.com/dor/businessrecords

New Mexico: sos.state.nm.us/Business_Services/Starting_A_Business.aspx

New York: dos.ny.gov/corps/index.html

North Carolina: sosnc.gov/divisions/business_registration

North Dakota: sos.nd.gov/business/business-registration

Ohio: sos.state.oh.us/businesses/

Oklahoma: sos.ok.gov/business/

Oregon: sos.oregon.gov/business/Pages/business-registry.aspx

Pennsylvania: dos.pa.gov/BusinessCharities/Business/Pages/default.aspx

Rhode Island: sos.ri.gov/divisions/business-services

South Carolina: sos.sc.gov/Business_Filings

South Dakota: sdsos.gov/business-services/business-licenses/default.aspx

Tennessee: sos.tn.gov/business-services

Texas: sos.state.tx.us/corp/index

Utah: corporations.utah.gov/

Vermont: sos.vermont.gov/corporations/

Virginia: scc.virginia.gov/clk/

Washington: sos.wa.gov/corps/

West Virginia: sos.wv.gov/business/Pages/default.aspx

Wisconsin: wdfi.org/corporations/

Wyoming: sos.wyo.gov/business/default.aspx