**Get Ready: Before Your Term Begins**

* Meet with the current president-elect 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/ATDPresidentElect.doc?_ga=2.176721957.1837891381.1544452308-1106022880.1509126965), 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 board development and role-specific resources available through ATD.
	+ 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), [Presidents Elect: What You Need to Know About Your Upcoming Presidential Term webcast](https://www.td.org/videos/president-elects-what-you-need-to-know-about-your-upcoming-presidential-termmp4)
* Brainstorm ideas for the year ahead and think about what impact you hope to have on the chapter.
* 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 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)
* Schedule regular check-ins with the president to collaborate on chapter administration, volunteer management, and strategic planning efforts.
	+ 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)

**Get Set: The First 30 Days**

* Coordinate with the past president and director of talent management/volunteers to identify and recruit successors for all board positions.
	+ Materials to review: [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), [Communicating the Value and ROI of Volunteer Leadership webcast](https://www.td.org/videos/communicating-the-value-and-roi-of-volunteer-leadership), [Communicating the Value and ROI of Volunteer Leadership Infographic](http://files.astd.org.s3.amazonaws.com/ChapterServices/%21CLC%20New%20Website/Chapter%20Administration%20Landing%20Page/Chapter%20Development/ROI%20of%20Volunteer%20Leadership%20Infographic%20101217.pdf?_ga=2.130194319.1837891381.1544452308-1106022880.1509126965), [Elevate Your Recruiting Message webcast](https://www.td.org/videos/elevate-your-recruiting-message), [Become an ATD Chapter Leader video](https://www.td.org/videos/become-an-atd-chapter-leader)
* 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)

**Go: 60 Days In**