**Get Ready: Before Your Term Begins**

**Get Set: The First 30 Days**

* Meet with the current finance/treasurer 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/ATDChapterFinance.doc?_ga=2.62977967.1837891381.1544452308-1106022880.1509126965), 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
* Learn about the budgeting process and any software or recordkeeping tools the chapter uses to track its finances.
  + Materials to review: chapter budget, financial software/tools, [Chapter Finance 101: Budgeting and Sharing Financial Data webcast](https://www.td.org/videos/chapter-finance-101-budgeting-and-sharing-financial-data)
* 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 financial data you will need to track and report 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)
* Learn about the Chapter Incentive Program (ChIP). Increase revenue by identifying and promoting opportunities for the chapter to participate.
  + Materials to review: [Chapter Incentive Program webpage](https://www.td.org/chapters/clc/chip), [Chapter Incentive Program Toolkit](http://files.astd.org/ChapterServices/%21CLC%20New%20Website/Resources/Toolkits/ChIP%20Toolkit%202015_.pdf?_ga=2.96197532.1837891381.1544452308-1106022880.1509126965)
* Look through the ATD Partnerships webpage to learn about discounts for ATD chapters.
  + Materials to review: [ATD Partnerships webpage](https://www.td.org/chapters/clc/atd-partnerships)
* Prepare to submit the chapter’s annual IRS filing and state filings.
  + Materials to review: [990 Filing Information](http://files.astd.org/ChapterServices/%21CLC%20New%20Website/Chapter%20Administration%20Landing%20Page/Chapter%20Development/IRS%20990%20Filing%20Job%20Aid.pdf?_ga=2.139171635.1837891381.1544452308-1106022880.1509126965), [Group Tax Exemption Information](http://files.astd.org.s3.amazonaws.com/ChapterServices/%21CLC%20New%20Website/Resources/Toolkits/ATD-Group_Tax_Exemption.pdf?_ga=2.139171635.1837891381.1544452308-1106022880.1509126965)
* If your chapter is incorporated, prepare to submit any required filings to the state. If your chapter is not incorporated, learn more about the benefits of incorporation and the process for becoming so.
  + Materials to review: [Incorporation Information](http://files.astd.org.s3.amazonaws.com/ChapterServices/%21CLC%20New%20Website/Resources/Toolkits/Incorporation%20Information%20.pdf?_ga=2.135918257.1837891381.1544452308-1106022880.1509126965)
* Record and analyze financial data to identify opportunities to cut costs, increase revenue, and invest in resources for chapter members.
  + Materials to review: chapter financial data
* Begin planning for the chapter’s annual financial review.
  + Materials to review: [Chapter Finance Toolkit](http://files.astd.org/ChapterServices/%21CLC%20New%20Website/Resources/Toolkits/Finance_Toolkit_2017.pdf?_ga=2.173079331.1837891381.1544452308-1106022880.1509126965)
* Develop an elevator pitch to recruit new chapter members and volunteers who can assist with finance-related tasks, such as conducting an internal audit.
  + Materials to review: [Elevate Your Recruiting Message webcast](https://www.td.org/videos/elevate-your-recruiting-message)
* Review Sharing Our Success (SOS) submissions related to finance to identify best practices that you can implement at your chapter.
  + Materials to review: [Finance SOS Submissions webpage](https://www.td.org/chapters/clc/sos/sos-all/finance)

**Go: 60 Days In**