Onboarding Email Series

Onboarding Email Series

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 structure and culture of the chapter. The emails included in this toolkit are designed to support the chapter president’s efforts to effectively onboard new leaders during the 60 days before and after the start of their terms. Each email highlights ATD resources related to their respective role and includes highlighted sections that allow for customization.

As you review the emails, take note of comments and sections highlighted in yellow to provide further information about contacts, resources, and processes related to your chapter. Use the table of contents to quickly navigate through emails that should be sent in a given timeframe or correspond to a particular role on the board.

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# Section I: send these emails 60 days before the term begins

## Director of Social Media

Dear [INCOMING Director of Social Media],

I hope this email finds you well!

I wanted to reach out to share a reminder about resources to review before your term gets started. I also wanted to connect you with [OUTGOING Director of Social Media], the outgoing director of social media, whose contact information is available below.

Name:

Phone Number:

Email:

Before your term begins, I would encourage you to:

* Review the director of social media position description.
* Review the standard operating procedures related to your role as well as any specific resources you will need to use.
* Set up a meeting with [OUTGOING Director of Social Media] to discuss the responsibilities, standard operating procedures, resources, and best practices for the role. Review his/her contributions over the past year, progress towards annual goals, and ideas for the future.
* Mark your calendar for upcoming board meetings and important chapter events.
* Brainstorm ideas for the year ahead and think about what impact you hope to have on the chapter.

We look forward to welcoming you to the [CHAPTER NAME] board, and please don’t hesitate to reach out if you have any questions.

Best,

## Director of Student Relations

Dear [INCOMING Director of Student Relations],

I hope this email finds you well!

I wanted to reach out to share a reminder about resources to review before your term gets started. I also wanted to connect you with [OUTGOING Director of Student Relations], the outgoing director of student relations, whose contact information is available below.

Name:

Phone Number:

Email:

Before your term begins, I would encourage you to:

* Review the director of student relations position description.
* Review the standard operating procedures related to your role as well as any specific resources you will need to use.
* Set up a meeting with [OUTGOING Director of Student Relations] to discuss the responsibilities, standard operating procedures, resources, and best practices for the role. Review his/her contributions over the past year, progress towards annual goals, and ideas for the future.
* Mark your calendar for upcoming board meetings and important chapter events.
* Brainstorm ideas for the year ahead and think about what impact you hope to have on the chapter.

We look forward to welcoming you to the [CHAPTER NAME] board, and please don’t hesitate to reach out if you have any questions.

Best,

## Director of Talent Management/Volunteers

Dear [INCOMING Director of Talent Management/Volunteers],

I hope this email finds you well!

I wanted to reach out to share a reminder about resources to review before your term gets started. I also wanted to connect you with [OUTGOING Director of Talent Management/Volunteers], the outgoing director of talent management/volunteers, whose contact information is available below.

Name:

Phone Number:

Email:

Before your term begins, I would encourage you to:

* Review the director of talent management/volunteers position description.
* Review the standard operating procedures related to your role as well as any specific resources you will need to use.
* Set up a meeting with [OUTGOING Director of Talent Management/Volunteers] to discuss the responsibilities, standard operating procedures, resources, and best practices for the role. Review his/her contributions over the past year, progress towards annual goals, and ideas for the future.
* Mark your calendar for upcoming board meetings and important chapter events.
* Brainstorm ideas for the year ahead and think about what impact you hope to have on the chapter.

We look forward to welcoming you to the [CHAPTER NAME] board, and please don’t hesitate to reach out if you have any questions.

Best,

## Finance/Treasurer

Dear [INCOMING Finance/Treasurer],

I hope this email finds you well!

I wanted to reach out to share a reminder about resources to review before your term gets started. I also wanted to connect you with [OUTGOING Finance/Treasurer], the outgoing finance/treasurer, whose contact information is available below.

Name:

Phone Number:

Email:

Before your term begins, I would encourage you to:

* Review the finance/treasurer position description.
* Review the standard operating procedures related to your role as well as any specific resources you will need to use.
* Set up a meeting with [OUTGOING Finance/Treasurer] to discuss the responsibilities, standard operating procedures, resources, and best practices for the role. Review his/her contributions over the past year, progress towards annual goals, and ideas for the future.
* Mark your calendar for upcoming board meetings and important chapter events.
* Brainstorm ideas for the year ahead and think about what impact you hope to have on the chapter.

We look forward to welcoming you to the [CHAPTER NAME] board, and please don’t hesitate to reach out if you have any questions.

Best,

## Past President

Dear [INCOMING Past President],

I hope this email finds you well!

I wanted to reach out to share a reminder about resources to review before your term gets started. I also wanted to connect you with [OUTGOING Past President], the outgoing past president, whose contact information is available below.

Name:

Phone Number:

Email:

Before your term begins, I would encourage you to:

* Review the past president position description.
* Review the standard operating procedures related to your role as well as any specific resources you will need to use.
* Set up a meeting with [OUTGOING Past President] to discuss the responsibilities, standard operating procedures, resources, and best practices for the role. Review his/her contributions over the past year, progress towards annual goals, and ideas for the future.
* Mark your calendar for upcoming board meetings and important chapter events.
* Brainstorm ideas for the year ahead and think about what impact you hope to have on the chapter.

We’re excited to continue working with you on the [CHAPTER NAME] board, and please don’t hesitate to reach out if you have any questions.

Best,

## President-Elect

Dear [INCOMING President-Elect],

I hope this email finds you well!

I wanted to reach out to share a reminder about resources to review before your term gets started. As the outgoing president-elect, I also wanted to connect with you to discuss the responsibilities, standard operating procedures, resources, and best practices for the role. My contact information is available below.

Name:

Phone Number:

Email:

Before your term begins, I would encourage you to:

* Review the president-elect position description.
* Review the standard operating procedures related to your role as well as any specific resources you will need to use.
* Set up a meeting with me to discuss the responsibilities, standard operating procedures, resources, and best practices for the role. We will review my contributions over the past year, progress towards annual goals, and ideas for the future.
* Mark your calendar for upcoming board meetings and important chapter events.
* Brainstorm ideas for the year ahead and think about what impact you hope to have on the chapter now and through your upcoming role as chapter president.

We look forward to welcoming you to the [CHAPTER NAME] board, and please don’t hesitate to reach out if you have any questions.

Best,

## VP Administration

Dear [INCOMING VP of Administration],

I hope this email finds you well!

I wanted to reach out to share a reminder about resources to review before your term gets started. I also wanted to connect you with [OUTGOING VP of Administration], the outgoing VP of administration whose contact information is available below.

Name:

Phone Number:

Email:

Before your term begins, I would encourage you to:

* Review the VP of administration position description.
* Review the standard operating procedures related to your role as well as any specific resources you will need to use.
* Set up a meeting with [OUTGOING VP of Administration] to discuss the responsibilities, standard operating procedures, resources, and best practices for the role. Review his/her contributions over the past year, progress towards annual goals, and ideas for the future.
* Mark your calendar for upcoming board meetings and important chapter events.
* Brainstorm ideas for the year ahead and think about what impact you hope to have on the chapter.

We look forward to welcoming you to the [CHAPTER NAME] board, and please don’t hesitate to reach out if you have any questions.

Best,

## VP of Marketing/Communications

Dear [INCOMING VP of Marketing/Communications],

I hope this email finds you well!

I wanted to reach out to share a reminder about resources to review before your term gets started. I also wanted to connect you with [OUTGOING VP of Marketing/Communications], the outgoing VP of marketing/communications whose contact information is available below.

Name:

Phone Number:

Email:

Before your term begins, I would encourage you to:

* Review the VP of Marketing/Communications position description.
* Review the standard operating procedures related to your role as well as any specific resources you will need to use.
* Set up a meeting with [OUTGOING VP of Marketing/Communications] to discuss the responsibilities, standard operating procedures, resources, and best practices for the role. Review his/her contributions over the past year, progress towards annual goals, and ideas for the future.
* Mark your calendar for upcoming board meetings and important chapter events.
* Brainstorm ideas for the year ahead and think about what impact you hope to have on the chapter.

We look forward to welcoming you to the [CHAPTER NAME] board, and please don’t hesitate to reach out if you have any questions.

Best,

## VP of Membership

Dear [INCOMING VP of Membership],

I hope this email finds you well!

I wanted to reach out to share a reminder about resources to review before your term gets started. I also wanted to connect you with [OUTGOING VP of Membership], the outgoing VP of membership whose contact information is available below.

Name:

Phone Number:

Email:

Before your term begins, I would encourage you to:

* Review the VP of membership position description.
* Review the standard operating procedures related to your role as well as any specific resources you will need to use.
* Set up a meeting with [OUTGOING VP of Membership] to discuss the responsibilities, standard operating procedures, resources, and best practices for the role. Review his/her contributions over the past year, progress towards annual goals, and ideas for the future.
* Mark your calendar for upcoming board meetings and important chapter events.
* Brainstorm ideas for the year ahead and think about what impact you hope to have on the chapter.

We look forward to welcoming you to the [CHAPTER NAME] board, and please don’t hesitate to reach out if you have any questions.

Best,

## VP of Programs

Dear [INCOMING VP of Programs],

I hope this email finds you well!

I wanted to reach out to share a reminder about resources to review before your term gets started. I also wanted to connect you with [OUTGOING VP of Programs], the outgoing VP of programs whose contact information is available below.

Name:

Phone Number:

Email:

Before your term begins, I would encourage you to:

* Review the VP of programs position description.
* Review the standard operating procedures related to your role as well as any specific resources you will need to use.
* Set up a meeting with [OUTGOING VP of Programs] to discuss the responsibilities, standard operating procedures, resources, and best practices for the role. Review his/her contributions over the past year, progress towards annual goals, and ideas for the future.
* Mark your calendar for upcoming board meetings and important chapter events.
* Brainstorm ideas for the year ahead and think about what impact you hope to have on the chapter.

We look forward to welcoming you to the [CHAPTER NAME] board, and please don’t hesitate to reach out if you have any questions.

Best,

## VP of Technology

Dear [INCOMING VP of Technology],

I hope this email finds you well!

I wanted to reach out to share a reminder about resources to review before your term gets started. I also wanted to connect you with [OUTGOING VP of Technology], the outgoing VP of technology, whose contact information is available below.

Name:

Phone Number:

Email:

Before your term begins, I would encourage you to:

* Review the VP of technology position description.
* Review the standard operating procedures related to your role as well as any specific resources you will need to use.
* Set up a meeting with [OUTGOING VP of Technology] to discuss the responsibilities, standard operating procedures, resources, and best practices for the role. Review his/her contributions over the past year, progress towards annual goals, and ideas for the future.
* Mark your calendar for upcoming board meetings and important chapter events.
* Brainstorm ideas for the year ahead and think about what impact you hope to have on the chapter.

We look forward to welcoming you to the [CHAPTER NAME] board, and please don’t hesitate to reach out if you have any questions.

Best,

# Section II: send these emails 30 days before the term begins

## Director of Social Media

Dear [INCOMING Director of Social Media],

I hope your initial meeting with [OUTGOING Director of Social Media] went well, and that you have a better understanding of the director of social media role.

As you gear up to begin your term, I wanted to share some information about the ATD resources available to support you. To learn about how ATD supports chapters, I would suggest that you:

* Complete the [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=2.25289149.12470707.1542032967-1106022880.1509126965) and watch the most recent [Chapter Leader Onboarding and Orientation webcast](https://www.td.org/chapter-webcast-search).
* Identify our chapter’s [Chapter Relations Manager](http://www.td.org/crm) (CRM) and [National Advisor for Chapters](http://www.td.org/nac) (NAC), who will serve as your points of contact for any questions related to ATD resources and chapter best practices.
* Familiarize yourself with the chapter’s communications plan and social media accounts. Learn about the resources available through ATD, such as the [Chapter Communications Toolkit](http://files.astd.org/ChapterServices/Toolkits/Communications%20Toolkit%202015.pdf?_ga=2.64002095.1837891381.1544452308-1106022880.1509126965) and [ATD chapter services social media accounts](https://www.td.org/chapters/clc/social-media).

Please feel free to contact me if you have any questions before your term begins, and I look forward to working with you.

Best,

## Director of Student Relations

Dear [INCOMING Director of Student Relations],

I hope your initial meeting with [OUTGOING Director of Student Relations] went well, and that you have a better understanding of the director of student relations role.

As you gear up to begin your term, I wanted to share some information about the ATD resources available to support you. To learn about how ATD supports chapters, I would suggest that you:

* Complete the [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=2.25289149.12470707.1542032967-1106022880.1509126965) and watch the most recent [Chapter Leader Onboarding and Orientation webcast](https://www.td.org/chapter-webcast-search).
* Identify our chapter’s [Chapter Relations Manager](http://www.td.org/crm) (CRM) and [National Advisor for Chapters](http://www.td.org/nac) (NAC), who will serve as your points of contact for any questions related to ATD resources and chapter best practices.
* Learn about the benefits of student membership at the chapter and [ATD](https://www.td.org/higher-education/students) levels.

Please feel free to contact me if you have any questions before your term begins, and I look forward to working with you.

Best,

## Director of Talent Management/Volunteers

Dear [INCOMING Director of Talent Management/Volunteers],

I hope your initial meeting with [OUTGOING Director of Talent Management/Volunteers] went well, and that you now have a better understanding of the director of talent management/volunteers role.

As you gear up to begin your term, I wanted to share some information about the ATD resources available to support you. To learn about how ATD supports chapters, I would suggest that you:

* Complete the [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=2.25289149.12470707.1542032967-1106022880.1509126965) and watch the most recent [Chapter Leader Onboarding and Orientation webcast](https://www.td.org/chapter-webcast-search).
* Identify our chapter’s [Chapter Relations Manager](http://www.td.org/crm) (CRM) and [National Advisor for Chapters](http://www.td.org/nac) (NAC), who will serve as your points of contact for any questions related to ATD resources and chapter best practices.
* Learn about the benefits of volunteer and chapter leadership. Watch the [Communicating the Value and ROI of Volunteer Leadership webcast](https://www.td.org/videos/communicating-the-value-and-roi-of-volunteer-leadership) and [Become an ATD Chapter Leader video](https://www.td.org/videos/become-an-atd-chapter-leader) and review the [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).

Please feel free to contact me if you have any questions before your term begins, and I look forward to working with you.

Best,

## Finance/Treasurer

Dear [INCOMING Finance/Treasurer],

I hope your initial meeting with [OUTGOING Finance/Treasurer] went well, and that you now have a better understanding of the finance/treasurer role.

As you gear up to begin your term, I wanted to share some information about the ATD resources available to support you. To learn about how ATD supports chapters, I would suggest that you:

* Complete the [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=2.25289149.12470707.1542032967-1106022880.1509126965) and watch the most recent [Chapter Leader Onboarding and Orientation webcast](https://www.td.org/chapter-webcast-search).
* Identify our chapter’s [Chapter Relations Manager](http://www.td.org/crm) (CRM) and [National Advisor for Chapters](http://www.td.org/nac) (NAC), who will serve as your points of contact for any questions related to ATD resources and chapter best practices.
* Watch the [Chapter Finance 101: Budgeting and Sharing Financial Data webcast](https://www.td.org/videos/chapter-finance-101-budgeting-and-sharing-financial-data).

Please feel free to contact me if you have any questions before your term begins, and I look forward to working with you.

Best,

## Past President

Dear [INCOMING Past President],

I hope your initial meeting with [OUTGOING Past President] went well, and that you now have a better understanding of the past president role.

As you gear up to begin your term, I wanted to share some information about the ATD resources available to support you. To learn about how ATD supports chapters, I would suggest that you:

* Identify our chapter’s [Chapter Relations Manager](http://www.td.org/crm) (CRM) and [National Advisor for Chapters](http://www.td.org/nac) (NAC), who will serve as your points of contact for any questions related to ATD resources and chapter best practices.
* Review the board development resources available through ATD including the [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), and [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).

Please feel free to contact me if you have any questions before your term begins, and I look forward to working with you.

Best,

## President-Elect

Dear [INCOMING President-Elect],

I hope you found our initial meeting helpful and have a better understanding of the president-elect role.

As you gear up to begin your term, I wanted to share some information about the ATD resources available to support you. To learn about how ATD supports chapters, I would suggest that you:

* Complete the [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=2.25289149.12470707.1542032967-1106022880.1509126965) and watch the most recent [Chapter Leader Onboarding and Orientation webcast](https://www.td.org/chapter-webcast-search).
* Identify our chapter’s [Chapter Relations Manager](http://www.td.org/crm) (CRM) and [National Advisor for Chapters](http://www.td.org/nac) (NAC), who will serve as your points of contact for any questions related to ATD resources and chapter best practices.
* Review the board development resources available through ATD, including the [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), and [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).
* Watch the [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).

Please feel free to contact me if you have any questions before your term begins, and I look forward to working with you.

Best,

## VP of Administration

Dear [INCOMING VP of Administration],

I hope your initial meeting with [OUTGOING VP of Administration] went well, and that you have a better understanding of the VP of administration role.

As you gear up to begin your term, I wanted to share some information about the ATD resources available to support you. To learn about how ATD supports chapters, I would suggest that you:

* Complete the [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=2.25289149.12470707.1542032967-1106022880.1509126965) and watch the most recent [Chapter Leader Onboarding and Orientation webcast](https://www.td.org/chapter-webcast-search).
* Identify our chapter’s [Chapter Relations Manager](http://www.td.org/crm) (CRM) and [National Advisor for Chapters](http://www.td.org/nac) (NAC), who will serve as your points of contact for any questions related to ATD resources and chapter best practices.
* Learn about the website and membership management platform(s) the chapter currently uses.

Please feel free to contact me if you have any questions before your term begins, and I look forward to working with you.

Best,

## VP of Marketing/Communications

Dear [INCOMING VP of Marketing/Communications],

I hope your initial meeting with [OUTGOING VP of Marketing/Communications] went well, and that you have a better understanding of the VP of marketing/communications role.

As you gear up to begin your term, I wanted to share some information about the ATD resources available to support you. To learn about how ATD supports chapters, I would suggest that you:

* Complete the [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=2.25289149.12470707.1542032967-1106022880.1509126965) and watch the most recent [Chapter Leader Onboarding and Orientation webcast](https://www.td.org/chapter-webcast-search).
* Identify our chapter’s [Chapter Relations Manager](http://www.td.org/crm) (CRM) and [National Advisor for Chapters](http://www.td.org/nac) (NAC), who will serve as your points of contact for any questions related to ATD resources and chapter best practices.
* Learn about the chapter’s process for developing and launching marketing campaigns and sharing regularly scheduled communications with the membership.
* Review the [Chapter Communications Toolkit](http://files.astd.org/ChapterServices/Toolkits/Communications%20Toolkit%202015.pdf?_ga=2.100897537.1837891381.1544452308-1106022880.1509126965) and [ATD Branding Guidelines](http://files.astd.org/ChapterServices/ATD-Branding-Hub/ATD-Chapter-Style-Guide-0714.pdf?_ga=2.168343201.1837891381.1544452308-1106022880.1509126965).

Please feel free to contact me if you have any questions before your term begins, and I look forward to working with you.

Best,

## VP of Membership

Dear [INCOMING VP of Membership],

I hope your initial meeting with [OUTGOING VP of Membership] went well, and that you have a better understanding of the VP of membership role.

As you gear up to begin your term, I wanted to share some information about the ATD resources available to support you. To learn about how ATD supports chapters, I suggest you:

* Complete the [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=2.25289149.12470707.1542032967-1106022880.1509126965) and watch the most recent [Chapter Leader Onboarding and Orientation webcast](https://www.td.org/chapter-webcast-search).
* Identify our chapter’s [Chapter Relations Manager](http://www.td.org/crm) (CRM) and [National Advisor for Chapters](http://www.td.org/nac) (NAC), who will serve as your points of contact for any questions related to ATD resources and chapter best practices.
* Learn about the benefits of [ATD membership](https://checkout.td.org/membership) and [Power Membership](http://www.td.org/powermember), which refers to joint chapter and ATD membership.

Please feel free to contact me if you have any questions before your term begins, and I look forward to working with you.

Best,

## VP of Programs

Dear [INCOMING VP of Programs],

I hope your initial meeting with [OUTGOING VP of Programs] went well, and that you have a better understanding of the VP of programs role.

As you gear up to begin your term, I wanted to share some information about the ATD resources available to support you. To learn about how ATD supports chapters, I suggest you:

* Complete the [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=2.25289149.12470707.1542032967-1106022880.1509126965) and watch the most recent [Chapter Leader Onboarding and Orientation webcast](https://www.td.org/chapter-webcast-search).
* Identify our chapter’s [Chapter Relations Manager](http://www.td.org/crm) (CRM) and [National Advisor for Chapters](http://www.td.org/nac) (NAC), who will serve as your points of contact for any questions related to ATD resources and chapter best practices.
* Review [ATD’s Conferences and Events webpage](https://www.td.org/events/us-conferences) and take note of any events that will take place in our region.
* Learn about the chapter’s process for planning monthly programs and annual events.

Please feel free to contact me if you have any questions before your term begins, and I look forward to working with you.

Best,

## VP of Technology

Dear [INCOMING VP of Technology],

I hope your initial meeting with [OUTGOING VP of Technology] went well, and that you have a better understanding of the VP of technology role.

As you gear up to begin your term, I wanted to share some information about the ATD resources available to support you. To learn about how ATD supports chapters, I suggest you:

* Complete the [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=2.25289149.12470707.1542032967-1106022880.1509126965) and watch the most recent [Chapter Leader Onboarding and Orientation webcast](https://www.td.org/chapter-webcast-search).
* Identify our chapter’s [Chapter Relations Manager](http://www.td.org/crm) (CRM) and [National Advisor for Chapters](http://www.td.org/nac) (NAC), who will serve as your points of contact for any questions related to ATD resources and chapter best practices.
* Learn about the website and membership management platform the chapter currently uses.
* Learn about any other technologies or software that the chapter currently uses, such as those that support team collaboration, marketing, or virtual programming.

Please feel free to contact me if you have any questions before your term begins, and I look forward to working with you.

Best,

# SECTion iii: send these emails when the term officially begins

## Director of Social Media

Dear [Director of Social Media],

Now that your term has officially started, I thought I would check in to see how things are going. I also wanted to address any questions you may have. If you don’t have any questions at the moment, please know that you can always reach out to me and other members of the board throughout your term.

As you get settled into the role, I recommend that you complete the following activities within the next 30 days. Completing these tasks will further your understanding of the chapter’s social media presence.

* Connect with the VP of marketing/communications to discuss how social media will support the chapter’s communications strategy.
* Explore the [Marketing and Branding materials webpage](https://www.td.org/chapters/clc/marketing-and-branding-materials), [Power Membership resources webpage](https://www.td.org/chapters/clc/powermembership), and [Free Content for Chapter Leaders](https://www.td.org/chapter-leader-community-clc/chapter-leader-free-content).
* Watch the [Let’s Get Social: Expanding Your Chapter’s Reach Through Social Media webcast](https://www.td.org/videos/lets-get-social-expanding-your-chapters-reach-through-social-media-20170329-1800-1).
* Review other [ATD chapters’ Twitter accounts](https://twitter.com/atdchapters/lists/atd-chapters) for new ideas and best practices.

I hope your term is off to a great start, and I’m thankful to have you on the board!

Best,

## Director of Student Relations

Dear [Director of Student Relations],

Now that your term has officially started, I thought I would check in to see how things are going. I also wanted to address any questions you may have. If you don’t have any questions at the moment, please know that you can always reach out to me and other members of the board throughout your term.

As you get settled into the role, I recommend that you complete the following activities within the next 30 days. Completing these tasks will further your understanding of the support the chapter provides to student members and how it currently engages with local universities.

* Assess how the chapter engages with local universities and supports student members. Review the [Engaging with Students and New Professionals Toolkit](http://files.astd.org/ChapterServices/Toolkits/Engaging%20Students%20and%20NP%202015.pdf?_ga=2.173642403.1837891381.1544452308-1106022880.1509126965), [Chapter Interest Group Guide](http://files.astd.org/ChapterServices/Toolkits/Chapter%20Interest%20Group%20Guide%202015.pdf?_ga=2.173642403.1837891381.1544452308-1106022880.1509126965), and [Working With Partners Toolkit](http://files.astd.org.s3.amazonaws.com/ChapterServices/%21CLC%20New%20Website/Resources/Toolkits/Working%20with%20Partners%202018%20Final.pdf?_ga=2.5572272.240878155.1549895109-1106022880.1509126965) to learn about additional resources and best practices.
* Review the [Chapter Affiliation Requirements (CARE) Element Quick List](https://d22bbllmj4tvv8.cloudfront.net/d4/5b/f14496704d9da079e0a736a4b2e2/2019-care-element-quick-list.pdf) and take note of the student-related data that you will need to track throughout the year.
* Watch the [Elevate Your Recruiting Message webcast](https://www.td.org/videos/elevate-your-recruiting-message) to develop an elevator pitch to share information about the benefits of chapter membership with students.

I hope your term is off to a great start, and I’m thankful to have you on the board!

Best,

## Director of Talent Management/Volunteers

Dear [Director of Talent Management/Volunteers],

Now that your term has officially started, I thought I would check in to see how things are going. I also wanted to address any questions you may have. If you don’t have any questions at the moment, please know that you can always reach out to me and other members of the board throughout your term.

As you get settled into the role, I recommend that you complete the following activities within the next 30 days. Completing these tasks will further your understanding of the chapter’s volunteer needs.

* Explore the board development resources available through ATD, such as the [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), and [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).
* Review the [Chapter Affiliation Requirements (CARE) Element Quick List](https://d22bbllmj4tvv8.cloudfront.net/d4/5b/f14496704d9da079e0a736a4b2e2/2019-care-element-quick-list.pdf) to learn about administrative activities and identify data that you will need to track throughout the year.
* Coordinate with the president-elect and past president to identify and recruit successors for all board positions.
* Watch the [Elevate Your Recruiting Message webcast](https://www.td.org/videos/elevate-your-recruiting-message) to develop an elevator pitch to recruit new volunteers and chapter leaders.

I hope your term is off to a great start, and I’m thankful to have you on the board!

Best,

## Finance/Treasurer

Dear [Finance/Treasurer],

Now that your term has officially started, I thought I would check in to see how things are going. I also wanted to address any questions you may have. If you don’t have any questions at the moment, please know that you can always reach out to me and other members of the board throughout your term.

As you get settled into the role, I recommend that you complete the following activities within the next 30 days. Completing these tasks will further your understanding of the details related to chapter finances.

* Review the past year’s chapter budget, learn about the budgeting process, and get up to speed on any software or recordkeeping tools the chapter uses to track its finances.
* Review the [Chapter Affiliation Requirements](https://www.td.org/chapters/clc/care) (CARE) to learn about the financial data you will need to track and report throughout the year.
* Review the [Chapter Finance Toolkit](http://files.astd.org/ChapterServices/%21CLC%20New%20Website/Resources/Toolkits/Finance_Toolkit_2017.pdf?_ga=2.22773435.1211899706.1551103311-1106022880.1509126965) to learn more about standard accounting processes and best practices for chapter financial management.
* Learn about the [Chapter Incentive Program](https://www.td.org/chapters/clc/chip) (ChIP) and review the [Chapter Incentive Program (ChIP) Toolkit](http://files.astd.org/ChapterServices/%21CLC%20New%20Website/Resources/Toolkits/ChIP%20Toolkit%202015_.pdf?_ga=2.96197532.1837891381.1544452308-1106022880.1509126965). Increase revenue by identifying and promoting opportunities for the chapter to participate.
* Look through the [ATD Partnerships webpage](https://www.td.org/chapters/clc/atd-partnerships) to learn about discounts for ATD chapters.
* Prepare to submit the chapter’s annual IRS filing and state filings.
* If your chapter is incorporated, prepare to submit any required filings to the state.

I hope your term is off to a great start, and I’m thankful to have you on the board!

Best,

## Past President

Dear [Past President],

Now that your term has officially started, I thought I would check in to see how things are going. I also wanted to address any questions you may have. If you don’t have any questions at the moment, please know that you can always reach out to me and other members of the board throughout your term.

As you get settled into the role, I recommend you complete the following activities within the next 30 days. Completing these tasks will further your understanding of the details related to the chapter’s CARE submission and succession planning strategy.

* Connect with me to review the [Chapter Affiliation Requirements](https://www.td.org/chapters/clc/care) (CARE), prepare for the chapter’s submission, and share best practices for survey completion.
* Coordinate with the president-elect and director of talent management/volunteers to identify and recruit successors for all board positions. Review the ATD resources available to support your efforts, such as the [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), and [Become an ATD Chapter Leader video](https://www.td.org/videos/become-an-atd-chapter-leader).

I hope your term is off to a great start, and I’m thankful to have you on the board!

Best,

## President-Elect

Dear [President-Elect],

Now that your term has officially started, I thought I would check in to see how things are going. I also wanted to address any questions you may have. If you don’t have any questions at the moment, please know that you can always reach out to me and other members of the board throughout your term.

As you get settled into the role, I recommend you complete the following activities within the next 30 days. Completing these tasks will further your understanding of the details related to the chapter’s CARE submission and strategic planning process.

* Schedule regular check-ins with me to collaborate on chapter administration, volunteer management, and strategic planning efforts.
* Review the [Chapter Affiliation Requirements (CARE) Element Quick List](https://d22bbllmj4tvv8.cloudfront.net/d4/5b/f14496704d9da079e0a736a4b2e2/2019-care-element-quick-list.pdf). Identify activities that the chapter will need to complete throughout the year as well as data that it will need to track.
* Look through strategic planning resources, such as the [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).

I hope your term is off to a great start, and I’m thankful to have you on the board!

Best,

## VP of Administration

Dear [VP of Administration],

Now that your term has officially started, I thought I would check in to see how things are going. I also wanted to address any questions you may have. If you don’t have any questions at the moment, please know that you can always reach out to me and other members of the board throughout your term.

As you get settled into the role, I recommend you complete the following activities within the next 30 days. Completing these tasks will further your understanding of the details related chapter administration.

* Review the [Chapter Affiliation Requirements](https://www.td.org/chapters/clc/care) (CARE) to take note of administrative activities that you will need to complete throughout the year.
* Review the process for taking minutes at chapter meetings and ensure that the minutes are made available to the membership.
* Maintain an updated repository of the chapter’s governing documents, including the chapter’s bylaws and any state and federal filings that the chapter submits. Look through the [Chapter Finance Toolkit](http://files.astd.org/ChapterServices/%21CLC%20New%20Website/Resources/Toolkits/Finance_Toolkit_2017.pdf?_ga=2.63502383.1837891381.1544452308-1106022880.1509126965) for additional information about record retention.

I hope your term is off to a great start, and I’m thankful to have you on the board!

Best,

## VP of Marketing/Communications

Dear [VP of Marketing/Communications],

Now that your term has officially started, I thought I would check in to see how things are going. I also wanted to address any questions you may have. If you don’t have any questions at the moment, please know that you can always reach out to me and other members of the board throughout your term.

As you get settled into the role, I recommend you complete the following activities within the next 30 days. Completing these tasks will further your understanding of chapter communications and marketing efforts.

* Assess how the chapter shares information with current and prospective members online and in person. Review the chapter’s website, email communications, and any materials used at chapter events.
* Review the [Chapter Affiliation Requirements (CARE) Element Quick List](https://d22bbllmj4tvv8.cloudfront.net/d4/5b/f14496704d9da079e0a736a4b2e2/2019-care-element-quick-list.pdf) and take note of the requirements that fall under the communication component. Identify activities that you will need to complete throughout the year as well as data you will need to track.
* Learn more about the marketing materials and resources available through ATD. Review the [marketing and branding materials webpage](https://www.td.org/chapters/clc/marketing-and-branding-materials), [Power Membership resources](https://www.td.org/chapters/clc/powermembership), [free content for chapter leaders](https://www.td.org/chapter-leader-community-clc/chapter-leader-free-content), and the [ATD chapter services social media pages](https://www.td.org/chapters/clc/social-media).

I hope your term is off to a great start, and I’m thankful to have you on the board!

Best,

## VP of Membership

Dear [VP of Membership],

Now that your term has officially started, I thought I would check in to see how things are going. I also wanted to address any questions you may have. If you don’t have any questions at the moment, please know that you can always reach out to me and other members of the board throughout your term.

As you get settled into the role, I recommend you complete the following activities within the next 30 days. Completing these tasks will further your understanding of the details related to both chapter and ATD membership.

* Familiarize yourself with the chapter’s current membership levels and benefits.
* Assess how the chapter welcomes members and shares information about the benefits of membership online and in person. Take note of any items that need to be updated or changed to improve the member experience.
* Review the [Chapter Affiliation Requirements (CARE) Element Quick List](https://d22bbllmj4tvv8.cloudfront.net/d4/5b/f14496704d9da079e0a736a4b2e2/2019-care-element-quick-list.pdf) and take note of the requirements that fall under the membership component. Identify activities that you will need to complete throughout the year as well as data you will need to track.
* Request a joint membership calculation and an ATD state list from the chapter’s [chapter relations manager](http://www.td.org/crm) (CRM) to track joint membership and identify prospective Power Members in our area.
* Learn about the process for purchasing chapter and ATD memberships individually and together, in one transaction.

I hope your term is off to a great start, and I’m thankful to have you on the board!

Best,

## VP of Programs

Dear [VP of Programs],

Now that your term has officially started, I thought I would check in to see how things are going. I also wanted to address any questions you may have. If you don’t have any questions at the moment, please know that you can always reach out to me and other members of the board throughout your term.

As you get settled into the role, I recommend that you complete the following activities within the next 30 days. Completing these tasks will further your understanding of the details related chapter programs.

* Review the [Chapter Affiliation Requirements](https://www.td.org/chapters/clc/care) (CARE) to learn about the professional development opportunities the chapter will need to organize throughout the year.
* Collect feedback from chapter members about potential program topics through conversations, surveys, and a review of prior program evaluations. Identify potential speakers, locations, and sponsors. Review the [Chapter Speaker Resources webpage](https://www.td.org/chapters/clc/chapter-speaker-resources) and [Working With Partners Toolkit](http://files.astd.org.s3.amazonaws.com/ChapterServices/%21CLC%20New%20Website/Resources/Toolkits/Working%20with%20Partners%202018%20Final.pdf?_ga=2.16770741.240878155.1549895109-1106022880.1509126965), and watch the [Building Win-Win Strategic Partnerships webcast](https://www.td.org/videos/building-win-win-strategic-partnerships).
* Watch the [Elevate Your Recruiting Message webcast](https://www.td.org/videos/elevate-your-recruiting-message) to develop an elevator pitch to recruit new chapter members, volunteers, and/or committee members who can support the planning and execution of chapter programs.

I hope your term is off to a great start, and I’m thankful to have you on the board!

Best,

## VP of Technology

Dear [VP of Technology],

Now that your term has officially started, I thought I would check in to see how things are going. I also wanted to address any questions you may have. If you don’t have any questions at the moment, please know that you can always reach out to me and other members of the board throughout your term.

As you get settled into the role, I would recommend that you complete the following activities within the next 30 days. Completing these tasks will further your understanding of chapter technology.

* Assess how the chapter shares information with current and prospective members online and in person. Review the chapter’s website, email communications, and any materials used at chapter events.
* Review the [Chapter Affiliation Requirements (CARE) Element Quick List](https://d22bbllmj4tvv8.cloudfront.net/d4/5b/f14496704d9da079e0a736a4b2e2/2019-care-element-quick-list.pdf) and take note of the requirements that fall under the communication component. Identify activities that you will need to complete throughout the year as well as data you will need to track.
* Audit the chapter’s website to identify and address outdated information about chapter membership and events, as well as ATD [membership](https://checkout.td.org/membership) and [events](https://www.td.org/events/us-conferences).
* Review the [Chapter Communications Toolkit](http://files.astd.org/ChapterServices/Toolkits/Communications%20Toolkit%202015.pdf?_ga=2.100897537.1837891381.1544452308-1106022880.1509126965), [ATD Branding Guidelines](http://files.astd.org/ChapterServices/ATD-Branding-Hub/ATD-Chapter-Style-Guide-0714.pdf?_ga=2.168343201.1837891381.1544452308-1106022880.1509126965), and [Power Membership resources](https://www.td.org/chapters/clc/powermembership).

I hope your term is off to a great start, and I’m thankful to have you on the board!

Best,

# Section IV: send these emails 30 days into the term

## Director of Social Media

Dear [Director of Social Media],

I hope this message finds you well!

How is everything going? Are there any social media successes or challenges that you’d like to discuss, either one-on-one, at our next board meeting, or with our Chapter Relations Manager (CRM) or National Advisor for Chapters (NAC)?

Now that you have a month of experience under your belt, I thought I would reach out to suggest a few additional activities that you can complete to expand your understanding of social media-related resources and best practices.

* Record and analyze data to assess the success of the chapter’s social media posts thus far and to identify opportunities for improvement.
* Explore new techniques and [tools](https://www.techsoup.org/) to increase engagement with the chapter’s social media platforms.
* Search through the [Sharing Our Success](http://www.td.org/sos) (SOS) database to identify best practices that will support your efforts to improve the chapter’s use of social media platforms.

As always, please don’t hesitate to reach out if you have any questions or if there are any resources I can share with you. Thank you for your service to the chapter, and I look forward to seeing how you will continue to grow our chapter’s social media presence.

Best,

## Director of Student Relations

Dear [Director of Student Relations],

I hope this message finds you well!

How is everything going? Are there any student engagement successes or challenges that you’d like to discuss, either one-on-one, at our next board meeting, or with our Chapter Relations Manager (CRM) or National Advisor for Chapters (NAC)?

Now that you have a month of experience under your belt, I thought I would reach out to suggest a few additional activities that you can complete to expand your understanding of student-related resources and best practices.

* Connect with the VPs of membership and programs to assess how the chapter’s current membership benefits and program offerings are serving student members and identify opportunities for improvement.
* Explore opportunities to develop chapter recognition programs, such as awards or scholarships, for students. Review the [Developing a Chapter Awards Program](http://files.astd.org.s3.amazonaws.com/ChapterServices/%21CLC%20New%20Website/Resources/Toolkits/Chapter%20Awards%20Program%20Toolkit%202015.pdf?_ga=2.160692157.1837891381.1544452308-1106022880.1509126965) toolkit for additional information.
* Search through the [Sharing Our Success](http://www.td.org/sos) (SOS) database to identify best practices that will support your efforts to increase the chapter’s student membership and develop partnerships with local universities.

As always, please don’t hesitate to reach out if you have any questions or if there are any resources I can share with you. Thank you for your service to the chapter, and I look forward to seeing how you will continue to engage and grow our student membership.

Best,

## Director of Talent Management/Volunteers

Dear [Director of Talent Management/Volunteers],

I hope this message finds you well!

How is everything going? Are there any volunteer successes or challenges that you’d like to discuss, either one-on-one, at our next board meeting, or with our Chapter Relations Manager (CRM) or National Advisor for Chapters (NAC)?

Now that you have a month of experience under your belt, I thought I would reach out to suggest a few additional activities that you can complete to expand your understanding of volunteer management-related resources and best practices.

* Review the chapter’s membership database and most recent membership survey to identify potential candidates for volunteer opportunities.
* Develop an onboarding process for new chapter volunteers and leaders.
* Search through the [Sharing Our Success](http://www.td.org/sos) (SOS) database to identify best practices that will support your efforts to recruit new chapter volunteers and leaders.

As always, please don’t hesitate to reach out if you have any questions or if there are any resources I can share with you. Thank you for your service to the chapter, and I look forward to seeing how you will continue to recruit and engage our chapter volunteers and leaders.

Best,

## Finance/Treasurer

Dear [Finance/Treasurer],

I hope this message finds you well!

How is everything going? Are there any financial successes or challenges that you’d like to discuss, either one-on-one, at our next board meeting, or with our Chapter Relations Manager (CRM) or National Advisor for Chapters (NAC)?

Now that you have a month of experience under your belt, I thought I would reach out to suggest a few additional activities that you can complete to expand your understanding of finance-related resources and best practices.

* Search through the [Sharing Our Success](http://www.td.org/sos) (SOS) database to identify best practices that will support your efforts to improve the chapter’s financial management and increase revenue.
* Watch the [Elevate Your Recruiting Message webcast](https://www.td.org/videos/elevate-your-recruiting-message) to develop an elevator pitch to recruit new chapter members and volunteers who can assist with finance-related tasks, such as conducting an internal audit.
* Begin [planning](http://files.astd.org/ChapterServices/%21CLC%20New%20Website/Resources/Toolkits/Finance_Toolkit_2017.pdf?_ga=2.173079331.1837891381.1544452308-1106022880.1509126965) for the chapter’s annual finance review.

As always, please don’t hesitate to reach out if you have any questions or if there are any resources I can share with you. Thank you for your service to the chapter, and I look forward to seeing how you will improve the chapter’s financial management and reporting procedures while also increasing chapter revenue.

Best,

## Past President

Dear [Past President],

I hope this message finds you well!

How is everything going? Are there any successes or challenges that you’d like to discuss, either one-on-one, at our next board meeting, or with our Chapter Relations Manager (CRM) or National Advisor for Chapters (NAC)?

Now that you have a month of experience under your belt, I thought I would reach out to suggest a few additional activities that you can complete to expand your understanding of resources and best practices related to the past president role.

* Learn more about the [Chapter Excellence Awards](https://www.td.org/chapters/clc/chapter-excellence-awards) (CEA) and prepare the chapter’s submission.
* Review [Sharing Our Success](http://www.td.org/sos) (SOS) submissions related to the past president role and chapter administration to identify best practices that you can implement at the chapter.

As always, please don’t hesitate to reach out if you have any questions or if there are any resources I can share with you. Thank you for your service to the chapter, and I look forward to learning from you.

Best,

## President-Elect

Dear [President-Elect],

I hope this message finds you well!

How is everything going? Are there any successes or challenges that you’d like to discuss, either one-on-one, at our next board meeting, or with our Chapter Relations Manager (CRM) or National Advisor for Chapters (NAC)?

Now that you have a month of experience under your belt, I thought I would reach out to suggest a few additional activities that you can complete to expand your understanding of resources and best practices related to the president-elect role.

* Search through the [Sharing Our Success](http://www.td.org/sos) (SOS) database to identify best practices that will support your efforts to improve chapter administration, set strategic goals for the chapter, and recruit new chapter leaders.
* Review the [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) and watch the [Elevate Your Recruiting Message webcast](https://www.td.org/videos/elevate-your-recruiting-message) to develop an elevator pitch to recruit new chapter members, volunteers, and leaders.
* Prepare to complete or update a risk management assessment for the chapter. Review the [Chapter Risk Assessment Guide](http://files.astd.org/ChapterServices/Toolkits/Chapter%20Risk%20Assessment%20Guide%202015.pdf?_ga=2.139116211.1837891381.1544452308-1106022880.1509126965) for additional information.

As always, please don’t hesitate to reach out if you have any questions or if there are any resources I can share with you. Thank you for your service to the chapter, and I look forward to helping you prepare to serve as chapter president.

Best,

## VP of Administration

Dear [VP of Administration],

I hope this message finds you well!

How is everything going? Are there any administrative successes or challenges that you’d like to discuss, either one-on-one, at our next board meeting, or with our Chapter Relations Manager (CRM) or National Advisor for Chapters (NAC)?

Now that you have a month of experience under your belt, I thought I would reach out to suggest a few additional activities that you can complete to expand your understanding of administration-related resources and best practices.

* Prepare to complete or update a risk management assessment for the chapter. Review the [Chapter Risk Assessment Guide](http://files.astd.org/ChapterServices/Toolkits/Chapter%20Risk%20Assessment%20Guide%202015.pdf?_ga=2.139116211.1837891381.1544452308-1106022880.1509126965) for additional information.
* Search through the [Sharing Our Success](http://www.td.org/sos) (SOS) database to identify best practices that will support your efforts to improve chapter administration.
* Contact the chapter’s [CRM](http://www.td.org/crm) as changes occur to the board roster.

As always, please don’t hesitate to reach out if you have any questions or if there are any resources I can share with you. Thank you for your service to the chapter, and I look forward to seeing how you will continue to improve the chapter’s administrative processes throughout the year.

Best,

## VP of Marketing/Communications

Dear [VP of Marketing/Communications],

I hope this message finds you well!

How is everything going? Are there any communication successes or challenges that you’d like to discuss, either one-on-one, at our next board meeting, or with our Chapter Relations Manager (CRM) or National Advisor for Chapters (NAC)?

Now that you have a month of experience under your belt, I thought I would reach out to suggest a few additional activities that you can complete to expand your understanding of communications-related resources and best practices.

* Record and analyze data to assess the success of the chapter’s marketing/communications thus far and to identify opportunities for improvement.
* Search through the [Sharing Our Success](http://www.td.org/sos) (SOS) database to identify best practices that will support your efforts to grow chapter membership.
* Watch the [Elevate Your Recruiting Message webcast](https://www.td.org/videos/elevate-your-recruiting-message) to develop an elevator pitch to recruit new volunteers who can assist with marketing-related tasks such as writing copy for promotional emails.
* Participate in the [ATD Education/Chapter Partnership Program](https://www.td.org/chapters/clc/education-partnership). Refer to the [ATD Education/Chapters Partnership Program toolkit](http://files.astd.org.s3.amazonaws.com/ChapterServices/%21CLC%20New%20Website/Chapter%20Administration%20Landing%20Page/Education%20Partnerships/ATD%20Education%20Chapter%20Partnership%20Toolkit%20%20092917.pdf?_ga=2.139067059.1837891381.1544452308-1106022880.1509126965) for additional information and best practices.

As always, please don’t hesitate to reach out if you have any questions or if there are any resources I can share with you. Thank you for your service to the chapter, and I look forward to seeing how you will continue to improve our chapter’s communications and marketing efforts.

Best,

## VP of Membership

Dear [VP of Membership],

I hope this message finds you well!

How is everything going? Are there any membership successes or challenges that you’d like to discuss, either one-on-one, at our next board meeting, or with our chapter relations manager (CRM) or National Advisor for Chapters (NAC)?

Now that you have a month of experience under your belt, I thought I would reach out to suggest a few additional activities that you can complete to expand your understanding of membership-related resources and best practices.

* Search through the [Sharing Our Success](http://www.td.org/sos) (SOS) database to identify best practices that will support your efforts to grow chapter membership.
* Watch the [Elevate Your Recruiting Message webcast](https://www.td.org/videos/elevate-your-recruiting-message) to develop an elevator pitch to recruit new chapter members, volunteers, and leaders.
* Review the [Engaging Students and New Professionals Toolkit](http://files.astd.org/ChapterServices/Toolkits/Engaging%20Students%20and%20NP%202015.pdf?_ga=2.170476899.2125334581.1543437754-1106022880.1509126965) to increase engagement with these groups at our chapter.
* Plan to send out the chapter’s annual membership survey. Be sure to refer to the [Annual Membership Survey job aid](http://files.astd.org.s3.amazonaws.com/ChapterServices/%21CLC%20New%20Website/Chapter%20Administration%20Landing%20Page/Chapter%20Development/Annual%20Membership%20Survey%20Job%20Aid%20120517%20Final.pdf?_ga=2.77808215.2125334581.1543437754-1106022880.1509126965) and [template](http://files.astd.org.s3.amazonaws.com/ChapterServices/%21CLC%20New%20Website/Chapter%20Administration%20Landing%20Page/Chapter%20Development/Annual%20Membership%20Survey%20Template%20Questions%20120517%20Final.docx?_ga=2.77808215.2125334581.1543437754-1106022880.1509126965) as needed.

As always, please don’t hesitate to reach out if you have any questions or if there are any resources I can share with you. Thank you for your service to the chapter, and I look forward to seeing how you will continue to engage and grow our membership.

Best,

## VP of Programs

Dear [VP of Programs],

I hope this message finds you well!

How is everything going? Are there any programming successes or challenges that you’d like to discuss, either one-on-one, at our next board meeting, or with our Chapter Relations Manager (CRM) or National Advisor for Chapters (NAC)?

Now that you have a month of experience under your belt, I thought I would reach out to suggest a few additional activities that you can complete to expand your understanding of programming-related resources and best practices.

* Search through the [Sharing Our Success](http://www.td.org/sos) (SOS) database to identify best practices that will support your efforts to improve the chapter’s professional development offerings.
* Record and analyze programming data to assess the success of your chapter’s events and identify opportunities for improvement.
* Connect with the VP of marketing/communications to brainstorm ideas for improving the chapter’s event marketing strategies.

As always, please don’t hesitate to reach out if you have any questions or if there are any resources I can share with you. Thank you for your service to the chapter, and I look forward to seeing how you will continue to improve the chapter’s programs throughout the year.

Best,

## VP of Technology

Dear [VP of Technology],

I hope this message finds you well!

How is everything going? Are there any technology successes or challenges that you’d like to discuss, either one-on-one, at our next board meeting, or with our Chapter Relations Manager (CRM) or National Advisor for Chapters (NAC)?

Now that you have a month of experience under your belt, I thought I would reach out to suggest a few additional activities that you can complete to expand your understanding of technology-related resources and best practices.

* 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](https://www.techsoup.org/) that might alleviate or solve these problems.
* Search through the [Sharing Our Success](http://www.td.org/sos) (SOS) database to identify best practices that will support your efforts to improve the chapter’s use of technology.

As always, please don’t hesitate to reach out if you have any questions or if there are any resources I can share with you. Thank you for your service to the chapter, and I look forward to seeing how you will continue to improve and increase our chapter’s use of technology.

Best,