

Set up your chapter

CLEO

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Start with the live checklist

Open [your chapter workspace](#) and check the chapter name. The checklist separates **Do now**, **Up next**, and **Done**. It reflects actual records; reading a guide does not mark anything complete.

Use this guide to organize the work. Use the [Chapter Leader Guide](#) for exact button-by-button instructions. You may prepare several things at once, but wait for the required agreements, supervision, and volunteer clearance before serving.

People and responsibilities

Person	Main responsibility
Chapter president or co-president	Coordinates the team, host relationship, schedule, and follow-through. May be a minor or adult.
Secretary, treasurer, media manager, or other officer	Shares practical tasks such as communications, attendance, approved finances, or publicity. A job title does not automatically grant every permission.
Adult advisor	Joins the chapter, accepts advisor and safety duties, and provides the chapter's adult review and continuity. Must be an adult.
School administrator	Acts for the school when authorized to review or sign its agreement. Receiving that document does not automatically make them the advisor or a Slack member.
Venue representative	Coordinates hosting and signs or acknowledges the appropriate venue document when authorized.

Person	Main responsibility
Volunteer	Registers, completes the required consent or waiver and training, and follows the handbook. May be a minor or adult.
Parent or guardian	Makes the required consent decision for a minor using their own private link.
CLEO National	Supports chapters and handles national decisions and exceptions. Start with the chapter's own advisor for local adult review.

Invite leaders and your advisor through **Team / Leadership** using their correct names and emails. They follow the invitation to Slack and finish setup. An invitation is not yet an active role, and an active advisor role is not yet accepted advisor responsibilities. See [team and advisor setup](#).

Work with your school

Follow your school's club recognition and supervision requirements. Ask who is authorized to sign the School Agreement, rather than assuming any teacher can sign it.

Use **Send your School Agreement** in the chapter workspace when offered. For a student under 18, the send needs adult review. If the chapter has no accepted advisor, the agreement email can be held even though the administrator's details were saved. Resolve the advisor setup and read **Paperwork** before asking the administrator to look for another email.

The school representative and chapter advisor may be the same adult when appropriate, but the application records those responsibilities separately. Do not ask a school for a facility insurance certificate solely because it is a school chapter; check the actual agreement and venue requirements.

Build a useful venue relationship

Use the [editable outreach emails and participant handouts](#) to prepare your introduction. Contact an activities director or another appropriate host representative. Explain that CLEO volunteers provide patient technology education and companionship. Discuss:

- What residents or visitors want help with, and which devices they use.
- Space, accessibility, connectivity, supervision, and the host's own rules.
- A dependable schedule, the host's contact person, and cancellation arrangements.
- How the host will tell residents about the visits: for example, a newsletter, poster, or activity calendar.

The setup slides suggest roughly weekly visits of 45–60 minutes as one workable model. Agree on a realistic arrangement with the host; that example is not a requirement created by this guide. Give advance notice when plans change, ideally at least a day when possible.

Add the venue in **Where you volunteer** and choose its real type. Senior-living residences use the Facility Agreement. Supported public venues use the applicable Host Acknowledgment. Virtual and other arrangements need National review. Do not choose an inaccurate type to bypass a requirement.

Complete the signing process and check the venue status. Where the agreement requires insurance evidence, upload the actual certificate and have the accepted adult advisor review it. A venue marked active can still have a missing insurance requirement. See [paperwork and venues](#) and [insurance](#).

Recruit and prepare volunteers

Once the host relationship looks practical, recruit through your school and local community. A small group that consistently attends is more useful than a long inactive list.

Share the chapter's **public volunteer sign-up link** from the workspace. Each volunteer registers there. For minors, the required consent goes to the guardian. Adult volunteers complete their own required signature. Keep individual signing and status links private.

Run the **volunteer training slides** linked directly above the workspace's onboarding confirmation. Include late joiners before they serve. Check both training and paperwork: a signature alone does not clear someone, and attending training does not replace consent.

The current onboarding confirmation applies to all current ordinary volunteers missing that year's training mark. If only some attended, do not confirm the whole group; ask for help recording the accurate attendance. See [volunteer training](#).

Prepare the first visit

Confirm the time, meeting place, host contact, adult arrangements, and actual eligible attendees. Consider a first meet-and-greet to learn people's interests and introduce the volunteers. Agree how you will record attendance and contact the host if something changes.

Before beginning, check the workspace's chapter, venue, and individual requirements. Keep help within volunteers' abilities and follow the [Volunteer Handbook](#). Residents should keep control of passwords and sensitive information.

Next: [Run your chapter](#). Keep the [platform instructions](#) handy for registration, signatures, and logging the visit.

About this edition

Updated 2026-10-09. [Open the current web guide](#). This PDF is an offline copy of the same reviewed text. Examples use fictional records; screenshots are dated in their captions.