



2026 Chapter Affiliation Requirements (CARE) Submission Summary

2026 CARE Submission Summary

CHAPTERS REPORTING ON THE 2025 CALENDAR YEAR

2026 CARE SUBMISSION SUMMARY

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SECTION 1: EXECUTIVE SUMMARY

SECTION 2: CHAPTER RESULTS

SECTION 3: ANNUAL UPDATE INFORMATION

SECTION 4: FOUNDATIONAL ELEMENTS ACHIEVEMENT DATA

SECTION 5: CARE PLUS ELEMENTS ACHIEVEMENT DATA

If you have any questions regarding the 2026 CARE Submission Summary, please contact:

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Section 1: Executive Summary

Submission Results

As of the CARE submission deadline date (January 31, 2026):

- **76 out of 76 active chapters (100%)** completed the CARE submission process.
- **70 chapters (92%)** achieved 100% in all elements. In 2025, 93% of chapters achieved 100% in all elements.

Achievement Data

The 76 submitting chapters self-reported their achievement across the six CARE Foundational areas.

1. CARE Elements with 100 Percent of Achievement

Element	Element Description
Board of Directors	The chapter board meets at least once per quarter.
	The chapter maintains written position descriptions for elected members.
	Chapter submits an incoming 2026 board roster using the Excel template.
Governance	The chapter's mission, vision, and bylaws align with those of ATD, and the chapter meets the ATD branding guidelines.
	Chapter submits 2026 Operational Plan.
	The chapter members participate in the nomination and election of the chapter board.
	The chapter complies with federal and state reporting requirements.
Finance	The chapter board develops an annual operating budget and makes it available to members.
	Chapter board has an internal or external financial review completed annually by a person or group not directly responsible for the management of chapter finances.
Membership	The chapter board assesses its members' needs and satisfaction levels at least once per year.
Programming	The chapter provides at least six (6) professional development activities per year for members.
Communication	The chapter maintains a current website with up-to-date information.
	The chapter disseminates a communication piece to members at least once a quarter that includes chapter and ATD programs and initiatives.

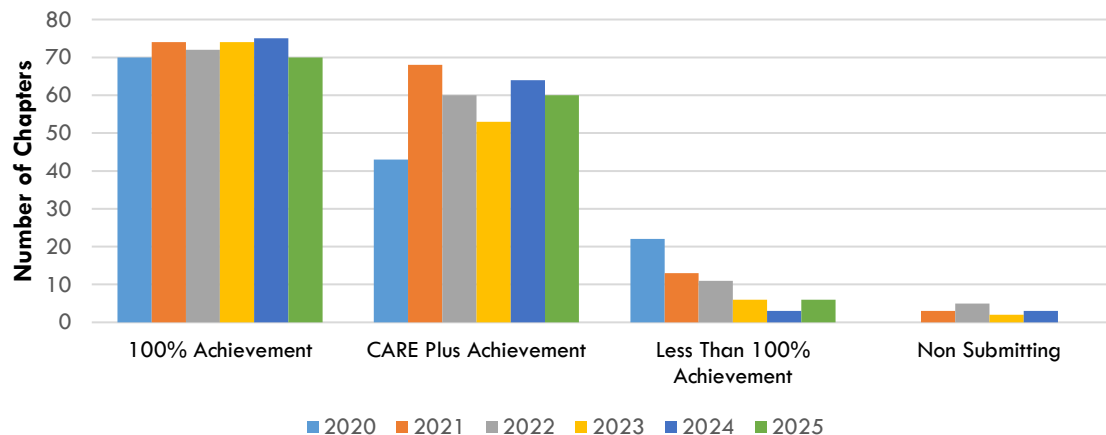
2. CARE Elements with Less Than 100 Percent of Achievement

Element	Element Description	Chapter % Achieved
Board of Directors	Chapter board members maintain Power membership.	97.4%
Finance	Chapter submits its most recent balance sheet and income statement through the survey submission site by January 31, 2026.	98.7%
Membership	2025 Chapter Membership Roster as of 12/31/25 Chapter submits year-end membership roster using the Excel template.	98.7%
	The chapter completes 10 joint membership activities of the chapter's choice.	97.4%
Communication	The chapter board shares the following information with members at least once per year: membership numbers, financial performance, and progress toward annual goals.	97.4%

What Does the CARE Information Tell Us?

The 2026 CARE results for ATD's 76 active chapters were:

Chapter CARE Achievement



SECTION 2: CHAPTER RESULTS

As of the CARE submission deadline date (January 31, 2026):

- **76 out of 76 active chapters (100%)** completed the CARE submission process.
- **70 (92%)** achieved 100 percent.
- **60 (76%)** achieved CARE Plus status.
- **6 chapters (8%)** achieved less than 100 percent.
- 3 chapters were dechartering or inactive and therefore not required to complete the CARE survey.

Chapters That Achieved 100 Percent CARE, as of January 31, 2026:

Brazos Valley	Madison Area	Sacramento
Central Oklahoma	Mississippi Valley	Smokey Mountain
Greater Cincinnati	New Orleans	
Lake Superior	Northeast Wisconsin	

Chapters That Achieved 100 Percent CARE and CARE Plus, as of January 31, 2026:

Alabama	Florida Suncoast	Northeast Florida
Ann Arbor	Fort Worth/Mid-Cities	Northern New Jersey
Arizona	Greater Atlanta	Orange County
Austin	Greater Boston	Pittsburgh
Baton Rouge	Greater Cleveland	Puget Sound
Buffalo Niagara	Greater Las Vegas	Research Triangle Area
Capital Region	Greater Richmond	Rhode Island
Cascadia	Hawaii	Rochester
Central Florida	Hawkeye	Rocky Mountain
Central Indiana	Houston	San Antonio
Central Iowa	Kansas City	San Diego
Central Massachusetts	Long Island	South Carolina
Central New York	Los Angeles	South Florida
Central Ohio	Maine	Southeastern Wisconsin
Central Pennsylvania	Maryland	St. Louis
Charlotte	Metro DC	Tulsa
Chicagoland	Mid New Jersey	Utah
Connecticut	Nashville	West Michigan
Cuyahoga Valley	Nebraska	
Dallas	New York City	
Detroit	North Dakota	

Chapters That Did Not Achieve 100 Percent CARE, as of January 31, 2026:

Greater Philadelphia	Greater Twin Cities	New Mexico
Greater Toledo	Memphis	Vermont

Dechartering or Inactive Chapters, as of January 31, 2026:

Appalachia	Kentuckiana	Puerto Rico
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SECTION 3: ANNUAL UPDATE INFORMATION

BOARD OF DIRECTORS

When are your chapter board meetings typically held? (n=76)

	Count	Percentage of Respondents
Monthly	66	86.8%
Bimonthly (occurring every two months)	4	5.2%
Quarterly	0	0%
Other	6	7.9%

Does your chapter pay for ATD membership dues for one or more chapter board members? (n=76)

	Count	Percentage of Respondents
Yes	49	64.5%
No	27	35.5%

When do your incoming board members **officially** begin their terms? (n=76)

	Count	Percentage of Respondents
First quarter (January through March)	66	86.8%
Second quarter (April through June)	1	1.3%
Third quarter (July through September)	9	11.8%
Fourth quarter (October through December)	0	0%

GOVERNANCE

What types of insurance coverage does your chapter have? Select all that apply. (n=76)

	Count	Percentage of Respondents
Directors' and officers' liability insurance	55	72.4%
Event-based insurance coverage	10	13.2%
General liability	46	60.5%
Professional liability	10	13.2%
None	4	5.3%

Is your chapter incorporated? (n=76)

	Count	Percentage of Respondents
Yes	60	78.9%
No	16	21.1%

FINANCE

Does your chapter pay for any administration help, such as a management firm or other administrative service? (n=76)

	Count	Percentage of Respondents
Yes	33	43.4%

No	43	56.6%
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MEMBERSHIP

What was your chapter's average membership number for 2024? (n=77)

	Count	Percentage of Respondents
0–49	12	15.8%
50–99	24	31.6%
100–149	10	13.2%
150–199	10	13.2%
200–249	11	14.5%
250–299	2	2.6%
300+	7	9.2%
Mean = 147.81		

Did your chapter raise dues in 2025? (n=76)

	Count	Percentage of Respondents
Yes	5	6.6%
No	71	93.4%

Did your chapter lower dues in 2025? (n=76)

	Count	Percentage of Respondents
Yes	2	2.6%
No	74	97.4%

Does your chapter plan to raise dues in 2026? (n=76)

	Count	Percentage of Respondents
Yes	7	9.2%
No	69	90.8%

How much are your regular membership dues? (n=76)

	Count	Percentage of Respondents
\$25–49	0	0%
\$50–74	23	30.7%
\$75–99	31	41.3%
\$100–124	4	5.3%
\$125–149	12	16%
\$150 or more	5	6.7%
Mean = \$88.95		

Which of these dues categories does your chapter have? (n=75)

	Count	Percentage of Respondents
Group/corporate membership	62	82.7%
Senior member	13	17.3%
Student member	71	94.7%
Young professional	9	12%

Other	36	48%
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How much are your **group or corporate** member dues (per person)? (n=60)

	Count	Percentage of Respondents
\$25–49	8	8.8%
\$50–74	18	28.1%
\$75–99	16	22.8%
\$100–124	8	15.8%
\$125–149	4	12.3%
\$150 or more	6	12.3%
Mean = \$87.8		

How much are your **senior** membership dues? (n=13)

	Count	Percentage of Respondents
\$0–24	1	7.7%
\$25–49	5	38.5%
\$50–74	5	38.5%
\$75–99	2	15.4%
Mean = \$49.62		

How much are your **student** membership dues? (n=71)

	Count	Percentage of Respondents
\$0–24	11	15.5%
\$25–49	38	53.5%
\$50–74	16	22.5%
\$75–99	5	7%
\$100 or more	1	1.4%
Mean = \$38.56		

How many student members does your chapter have? (n=70)

	Count	Percentage of Respondents
Have a student rate but no student members	8	11.4%
1–9	48	68.6%
10–19	9	12.9%
20–29	2	2.9%
30 or more	3	4.3%
Mean = 10 students		

Which of these are requirements for a student to get the student membership rate? (n=71)

	Count	Percentage of Respondents
Attend an accredited university or college	59	83.1%
Demonstrate they are taking classes in a talent development-related field	19	26.8%
Demonstrate they are in a degree program in a talent development-related field	17	23.9%
Take a minimum number of credit hours	15	21.1%

Some other criteria	6	8.5%
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How much are your **young professional** dues? (n=8)

	Count	Percentage of Respondents
\$0-24	0	0%
\$25-49	2	25%
\$50-74	4	50%
\$75-99	2	25%
Mean = \$57.88		

Does your chapter provide ATD members a discount on chapter membership? (n=76)

	Count	Percentage of Respondents
Yes	21	27.6%
No	55	72.4%

What is the percentage of your discount? (n=16)

	Count	Percentage of Respondents
1-9	2	10.5%
10-19	8	47.4%
20-29	4	21.1%
30 or more	4	21.1%

PROGRAMMING

When are most of your regular programs held? Select all that apply. (n=76)

	Count	Percentage of Respondents
Morning	32	42.1%
Lunchtime	50	65.8%
Afternoon	11	14.5%
Evening	51	67.1%
Other	5	6.6%

What is the average number of people at your regular monthly chapter meeting? (n=73)

	Count	Percentage of Respondents
0-19	37	50.7%
20-39	31	42.5%
40-59	5	6.8%
60 or more	0	0%
Mean = 20 People		

What is the approximate registration fee for a **chapter member** to attend a chapter program? (n=73)

	Count	Percentage of Respondents
Free	32	43.2%
\$1-9	4	5.4%
\$10-19	15	20.3%
\$20-29	13	17.6%

\$30 or more	10	13.5%
Mean = \$11.73		

What is the approximate registration fee for a **nonmember** to attend a chapter program? (n=73)

	Count	Percentage of Respondents
Free	1	1.4%
\$1–9	1	1.4%
\$10–19	18	24.7%
\$20–29	24	32.9%
\$30–39	13	17.8%
\$40 or more	16	21.9%
Mean = \$27.23		

What is the registration fee for a **chapter member** to attend a chapter-sponsored conference? (n=51)

	Count	Percentage of Respondents
Free	8	15.7%
\$1–49	6	11.8%
\$50–99	8	15.7%
\$100–149	5	9.8%
\$150–199	8	15.7%
\$200 or more	16	31.4%
Mean = \$128.41		

What is the registration fee for a **nonmember** to attend a chapter-sponsored conference? (n=49)

	Count	Percentage of Respondents
Free	2	4.1%
\$1–49	8	16.3%
\$50–99	6	12.2%
\$100–149	4	8.2%
\$150–199	9	18.4%
\$200–249	7	14.3%
\$250–\$299	4	8.2%
\$300–\$349	6	12.2%
\$350+	3	6.1%
Mean = \$171.86		

COMMUNICATION

Which of the following social media channels does your chapter have? (n=76)

	Count	Percentage of Respondents
Facebook	41	53.9%
Instagram	26	34.2%
LinkedIn group	73	96.1%
Twitter	10	13.2%
YouTube	20	26.3%
Blog	4	5.3%

Other	16	21.1%
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Section 4: Foundational Elements Achievement Data

BOARD OF DIRECTORS

- 1.1 Chapter submits an incoming 2026 board roster using the Excel template. (n=76)

	Count	Percentage of Respondents
Achieved	76	100%
Did Not Achieve	0	0%

- 1.2 The chapter board meets at least once per quarter. (n=76)

	Count	Percentage of Respondents
Achieved	76	100%
Did Not Achieve	0	0%

- 1.3 Chapter board members maintain Power Membership (joint chapter/ATD national membership). (n=76)

	Count	Percentage of Respondents
Achieved	74	97.4%
Did Not Achieve	2	2.6%

- 1.4 Chapter maintains written position descriptions for elected members. (n=76)

	Count	Percentage of Respondents
Achieved	76	100%
Did Not Achieve	0	0%

GOVERNANCE

- 2.1 The chapter's mission, vision, and bylaws align with those of ATD, and the chapter meets the ATD branding guidelines. (n=76)

	Count	Percentage of Respondents
Achieved	76	100%
Did Not Achieve	0	0%

- 2.2 The chapter complies with federal and state reporting requirements. (n=76)

	Count	Percentage of Respondents
Achieved	76	100%
Did Not Achieve	0	0%

- 2.3 The chapter members participate in the nomination and election of the chapter board. (n=76)

	Count	Percentage of Respondents
Achieved	76	100%
Did Not Achieve	0	0%

2.4 The chapter submitted an operational plan. (n=76)

	Count	Percentage of Respondents
Achieved	76	100%
Did Not Achieve	0	0%

FINANCE

3.1 Chapter must upload its most recent balance sheet and income statement through the survey submission site by January 31, 2026. (n=76)

	Count	Percentage of Respondents
Achieved	75	98.7%
Did Not Achieve	1	1.3%

3.2 The chapter board develops and approves an annual operating budget and makes it available to members. (n=76)

	Count	Percentage of Respondents
Achieved	76	100%
Did Not Achieve	0	0%

3.3 Chapter board has an internal or external financial review completed annually by a person or group not directly responsible for managing chapter finances. (n=76)

	Count	Percentage of Respondents
Achieved	76	100%
Did Not Achieve	0	0%

3.4 Chapter submitted most recent income statement. (n=76)

	Count	Percentage of Respondents
Achieved	75	98.7%
Did Not Achieve	1	1.3%

3.5 Chapter submitted most recent balance sheet. (n=76)

	Count	Percentage of Respondents
Achieved	75	98.7%
Did Not Achieve	1	1.3%

MEMBERSHIP

4.1 The chapter board assesses its members' needs and satisfaction levels at least once per year. (n=76)

	Count	Percentage of Respondents
Achieved	76	100%
Did Not Achieve	0	0%

- 4.2 The chapter completes 10 joint membership activities of the chapter's choice. (n=76)

	Count	Percentage of Respondents
Achieved	74	97.4%
Did Not Achieve	2	2.6%

PROGRAMMING

- 5.1 The chapter provides members with at least six professional development activities per year. (n=76)

	Count	Percentage of Respondents
Achieved	76	100%
Did Not Achieve	0	0%

COMMUNICATION

- 6.1 The chapter maintains a current website with up-to-date information. (n=76)

	Count	Percentage of Respondents
Achieved	76	100%
Did Not Achieve	0	0%

- 6.2 The chapter disseminates a communication piece to members at least once a quarter, including chapter and ATD programs and initiatives. (n=76)

	Count	Percentage of Respondents
Achieved	76	100%
Did Not Achieve	0	0%

- 6.3 At least once per year, the chapter board shares information about membership numbers, financial performance, and progress toward annual goals with members. (n=76)

	Count	Percentage of Respondents
Achieved	74	97.4%
Did Not Achieve	2	2.6%

SECTION 5: CARE PLUS ELEMENTS ACHIEVEMENT DATA

BOARD OF DIRECTORS

- 1.1 The chapter provides a defined orientation/onboarding process for incoming board members. (n=76)

	Count	Percentage of Respondents
True	74	97.4%
False	2	2.6%

How is the board member onboarding delivered? Select all that apply. (n=74)

	Count	Percentage of Respondents
Hybrid	48	64.9%

In-person	22	29.7%
Virtually	37	50%

Approximately what is the frequency of your board member onboarding? (n=74)

	Count	Percentage of Respondents
Annually	27	36.5%
As needed	40	54.1%
Monthly	6	8.1%
Quarterly	1	1.4%

In what month(s) does the board member onboarding occur? (n=73)

	Count	Percentage of Respondents
January	55	75.3%
February	20	27.4%
March	13	17.8%
April	13	17.8%
May	12	16.4%
June	15	20.5%
July	18	24.7%
August	14	19.2%
September	9	12.3%
October	17	23.3%
November	25	34.2%
December	40	54.8%

What kind of coaching/mentoring does the chapter provide board members? (n=74)

	Count	Percentage of Respondents
Board meetings, strategy session, and/or board retreat has time dedicated to board member coaching/mentoring.	68	91.9%
New board members shadow and/or attend board meetings prior to the start of their term.	61	82.4%
Onboarding materials made available to incoming positions	55	74.3%
Outgoing position mentors incoming position.	66	89.2%
President one-on-one	66	89.2%
President team (president, president-elect, past president)	52	70.3%
Other	12	16.2%

If "Other," briefly explain what type of coaching/mentoring does the chapter provide?

- Weekly training and check-in calls to share everything from file locations to upcoming events, marketing strategies, etc.

- We review the job description, orient the person to where to find archived items, when possible pair them up with a previous incumbent in their job. The transition happens at the July strategic planning meeting - by the end of that meeting the person has a rough action plan and draft objectives so they have a focus and know where to get help.
- We meet one-on-one for the specific Mentor and Incoming at least once. Then encourage as needed via phone call, text, or email. We encourage any Chapter Member to join Board Meetings to learn more about how the Chapter Functions.
- We have an advisory committee that assists in helping new board members through coaching and mentoring. They attend our Strategy planning sessions and are accessible upon need.
- This varies somewhat from position to position.
- The President, The Director of Finance and the Business Manager coordinate onboarding
- President Emeritus provides detailed one-on-one onboarding for online features - Wild Apricot, SharePoint, ATD Houston website, email
- Each of the three Senior Advisor are assigned board members to mentor
- Each new Board member is asked to meet with all existing board members to gain insight and perspective on their responsibilities and vision.
- Chapter Admin
- Board members can select a mentor from past presidents if they would like additional mentoring opportunity
- Additional board onboarding support includes: functional playbooks updated by outgoing board members in handover to successors, Slack support, technology onboarding, 1:1 meetings with outgoing President & incoming President, etc.

Who leads the onboarding of new board member(s)? Select all that apply. (n=74)

	Count	Percentage of Respondents
Board member role dedicated to onboarding	16	21.6%
President	65	87.8%
Role predecessor	67	90.5%
Other	15	20.3%

If "Other," briefly explain who is leading the onboarding of new board member(s):

- The VP of the functional team leads new board members onboarding in partnership with role predecessor. President onboards the President-Elect.
- The VP of Finance speaks with all new board members about their budgets.
- The President, The Director of Finance and the Business Manager coordinate onboarding
- Tech Ops and Board Admin
- President-Elect
- President team; Director of Operations; Director of Tech & Admin
- President Emeritus
- President Elect also supports board member onboarding
- Past President
- It's a joint effort. Mainly Current President, Past-President, but also Incoming President. In addition as the new board member has questions we lean on our current Board members to answer what may be under their role or responsibility. For example, Membership information would come from the VP of Membership.

- Chapter Admin
- As a group at Board Meetings and/or Special Project Meetings.
- Also leverages President-Elect
- Advisory Board Members
- Administrator and the Executive team

1.2 The chapter has a succession strategy for identifying and filling board member positions. (n=76)

	Count	Percentage of Respondents
True	73	96.1%
False	3	3.9%

Describe the elements of your succession strategy. Select all that apply. (n=72)

	Count	Percentage of Respondents
Has a nominating committee responsible for selecting board members	31	43.1%
Has board member dedicated to identifying future board members	28	38.9%
Has multiple touchpoints with prospects to keep them engaged and informed	56	77.8%
Maintains an ongoing list of prospective board members detailing the fit for a specific role and the individual's skills/traits	33	45.8%
Offers opportunities to attend board meetings to educate prospective board members on board activities	51	70.8%
Other	16	22.2%

If "Other," briefly describe the actions in your succession strategy:

- We post on social media when we have board roles open and in Aug-Sep as we begin to plan the board for the following year.
- We post any upcoming or open board positions on our website. We promote these opportunities in email communications and during events. We are building committees that are connected to each board member from which we can mentor candidates for the board.
- We host an annual "Meet the Board" happy hour event to recruit and cultivate relationships with prospective board members & extended leadership (AVPs & volunteers).
- We have had tremendous luck engaging members into committee positions and using that as a pipeline to electing them to a board seat.
- We have a Director of Volunteers who meets with new chapter members and determines if they would like to volunteer. Volunteers are given opportunities to become board committee members with the intention of leading to a future board position
- We also have coffee chats with one on one interviews.
- We also have a board role dedicated to recruiting volunteers and board members.
- Trial period
- This year we offered meet n greet education sessions for anyone interested in exploring a board position.
- The President together with the Board as a Group identifies future Board Members.

- Social Media, emails, notices, part of the Operating Plan
- Offers Orientation programs that include encouraging leadership
- Each Board Role is responsible for creating a committee for their perspective responsibilities and engaging with potential board members. All board members and Advisory board collaborate and reach out to prospective members to serve in open positions.
- Each board member has a committee of volunteer support that they train and develops potential successors for their role.
- Directors typically become VP board members
- Board meets ahead of time to discuss succession planning broadly and recruits early in the year for shadowing and overlap.

Does your chapter review its succession plan annually? (n=71)

	Count	Percentage of Respondents
Yes	69	92.7%
No	2	2.8%

- 1.3 The chapter has a volunteer recruitment strategy in place for positions supporting the board's work. (n=76)

	Count	Percentage of Respondents
True	68	89.5%
False	8	10.5%

The chapter volunteer recruitment strategy includes: (n=69)

	Count	Percentage of Respondents
Board is structured for succession planning	44	65.7%
Dedicated webpage highlighting opportunities	43	64.2%
Position dedicated to coordinating chapter volunteers	32	47.8%
Targeted outreach to prospective volunteers	52	77.6%
Volunteer job descriptions	38	56.7%
Volunteer marketing using the website, social media, and email	49	73.1%
Volunteer open house	11	16.4%
Volunteer recruitment goal included in annual goals and strategies	28	41.8%
Other	12	17.9%

If "Other," describe the elements of your recruitment strategy:

- We have subcommittees with volunteer members that help with the work for certain board positions they often are a pipeline for a future board seat.
- We have an opportunity for members to indicate they wish to volunteer with the chapter with every registration form for every event.

- We continue to share what we do at every meeting and share we are always open to volunteers whether project-based or for a full-term.
- VP Membership also handles Volunteers and Students
- Utilize Advisory Board for outreach and touchpoints with membership assisting in matching skills of members to serve in future board roles.
- Opportunities at the end of each program meeting to learn about the chapter and volunteer opportunities
- New Member Meetup we talk about volunteer opportunities and open board roles
- Host virtual volunteer info sessions, where opportunities are discussed and Q&A is available
- During Chapter meetings, we have a slide on our presentation that talks about volunteer opportunities.
- Connection 1:1 meetings
- As a part of our recruitment strategy, we created a promotional video for volunteer recruitment and an 80th year video for recruitment of volunteers.
- Annual board interest event - this event is advertised via social media, newsletter and our website. In addition, individuals we think may be interested/are qualified are invited.

1.4 At least one board member (excluding paid administrators) attends a NAC area call. (n=76)

	Count	Percentage of Respondents
True	72	94.7%
False	4	5.3%

1.5 The chapter had board member(s) attend ATD Chapter Leaders Conference (ALC). (n=76)

	Count	Percentage of Respondents
True	63	82.9%
False	13	17.1%

1.6 The chapter has an advisory board or council that involves past presidents in chapter activities. (n=76)

	Count	Percentage of Respondents
True	49	64.5%
False	27	35.5%

1.7 The chapter board meets to plan for the future strategically. (n=76)

	Count	Percentage of Respondents
True	74	97.4%
False	2	2.6%

1.8 The chapter board submitted a best practice to the SOS program in the past year. (n=76)

	Count	Percentage of Respondents
True	28	36.8%
False	48	63.2%

GOVERNANCE

- 2.1 The chapter board maintains and updates its standard operating procedures (SOPs) annually or as needed throughout the year. (n=76)

	Count	Percentage of Respondents
True	68	89.5%
False	8	10.5%

Which of the following does your SOPs include? (n=68)

	Count	Percentage of Respondents
CARE requirements	53	77.9%
Chapter background	29	42.6%
Conflict of interest policy	34	50%
Election of officers	52	76.5%
Job descriptions	61	89.7%
Mission and vision	58	85.3%
Organizational chart	27	39.7%
Past presidents	32	47.1%
Policies and procedures	55	80.9%
Strategic goals	53	77.9%
Other	13	19.1%

Please explain any additional items included in your chapter's SOPs:

- What CARE is broadly - not specific requirements, Membership, Finances, Basically how the business of the chapter is done.
- We have several ongoing documents that incorporate all of these elements that we review each year. We incorporate the Core Responsibilities and Activities Plan into our annual action plan. We call this our Annual Responsibilities and Action Plan. Each VP creates one from our template and we use this as a benchmark for the year. We also use it for onboarding new Board members. In addition we have our Job Description for each position.
- VPs have created some of their own SOPs for their area (for example, how to create an event in Wild Apricot - Programs)
- Technology instructions (chapter website, Drive, Zoom)
- Succession Planning/Transfer of Office Technology/Document Storage Communication tools
- Sponsorship SOPs for conferences and events. Finance SOPs for consistent operations and 990 filing; and EAB SOPs for how to run quarterly EOB meetings.
- SOP for running our Peer Mentoring programming, SOP for balancing the financial each month
- Nominating committee, bylaws committee, volunteer gifts,
- Finance review processes Membership role procedures and processes
- Crisis Communication and Continuity Whistleblower Role based Gmail account transition
- Bylaws
- Bylaw review and financial review
- Awarding scholarships, in-kind donations, Fall Conference processes, procedures, and policies, VP of Membership handbook, VP of Finance handbook, VP of Finance handbook, Director of Production SOPs, Director of Volunteers SOPs

- 2.2 The chapter board reviews its bylaws annually, including a review of the bylaws as part of board member onboarding. (n=76)

	Count	Percentage of Respondents
True	71	93.4%
False	5	6.6%

- 2.3 The chapter makes board meeting minutes/summaries available to members. (n=76)

	Count	Percentage of Respondents
True	72	94.7%
False	4	5.3%

How are board meeting minutes/summaries made available to members? (n=72)

	Count	Percentage of Respondents
Emailed upon request	46	63.9%
Included in newsletter	1	1.4%
Posted on member-only website	37	51.4%
Posted publicly on website	8	8.1%
Other	7	9.7%

- 2.4 The board maintains a central repository or document library for archiving important chapter documents. (n=76)

	Count	Percentage of Respondents
True	76	100%
False	0	0%

What system does the chapter use as a central repository or document library for archiving important documents? (n=78)

	Count	Percentage of Respondents
Basecamp	2	2.6%
Choice Box	1	1.3%
Dropbox	5	6.6%
Google Drive	67	88.2%
SharePoint	2	2.6%
Wild Apricot	38	50%
OneDrive	1	1.3%
Other	3	3.9%

Please list any alternate platforms your chapter is using for documents:

- Asana
- Slack
- StarChapter

FINANCE

- 3.1 The chapter has approximately three to six months of operating expenses set aside. (n=76)

	Count	Percentage of Respondents
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True	73	96.1%
False	3	3.9%

3.2 The chapter board completes a risk assessment and reviews it annually. (n=75)

	Count	Percentage of Respondents
True	42	56%
False	33	44%

3.3 The chapter budgets to send board members to the ATD Chapter Leaders Conference (ALC) and/or covers the cost of ATD membership. (n=75)

	Count	Percentage of Respondents
True	63	84%
False	12	16%

How many chapter leaders are budgeted to attend ALC in 2024? (n=64)

	Count	Percentage of Respondents
0	2	3.3%
1	13	21.7%
2	17	28.3%
3	11	18.3%
4	4	6.7%
5	1	1.7%
6	4	6.7%
7+	8	13.4%

3.4 The chapter's partnership strategy identifies, recruits, and maintains partnerships to support chapter programming and operations. (n=76)

	Count	Percentage of Respondents
True	64	84.2%
False	12	15.8%

If "True," please select the type of partner(s) the chapter works with. (n=64)

	Count	Percentage of Respondents
Other ATD chapter(s)	51	79.7%
Higher education	36	56.3%
Content provider/LMS	15	23.4%
Other professional association(s)	37	57.8%
Business(s) or nonprofits(s)	49	76.6%
Other	4	6.3%

3.5 The chapter has sponsors to support chapter programming and operations. (n=76)

	Count	Percentage of Respondents
True	64	84.2%
False	12	15.8%

If "True," please select the type of sponsor(s) the chapter works with. (n=64)

	Count	Percentage of Respondents
Local business(s)	48	75%
Higher education	28	43.8%
Learning/consulting agency	38	59.4%
Content provider/LMS	19	29.7%
Other	11	17.2%

MEMBERSHIP

4.1 The chapter has a member/volunteer recognition or spotlight program. (n=76)

	Count	Percentage of Respondents
True	63	82.9%
False	13	17.1%

How does the chapter provide recognition? (n=63)

	Count	Percentage of Respondents
Hosts an appreciation event	29	46%
Provides an award or gift	30	47.6%
Recognizes at in-person event	37	58.7%
Recognize in chapter newsletter	29	46%
Spotlights on the chapter website and/or social media	46	73%
Other	7	11.1%

If "Other," describe the ways the chapter provides recognition:

- We host a Year-end event for our SIG Leaders each year. We also recognize our volunteers at our conference. The chapter offers a job board, consultant referral service, resume workshop, or other service(s) not included in your chapter's member benefits.
- We are relaunching our monthly Member Spotlight series where members respond to interview questions. Their picture and responses are hosted on our website. At events we take time to thank members and volunteers who have contributed time and expertise to our chapter.
- Recognize at chapter meetings and Award Dinner Virtual volunteer appreciation event
- Highlights in social media of volunteers especially for Tech Conference (held in spring) and Talent Development Conference (held in fall).
- end of the year celebration for members and volunteers
- Digital Certificate
- Chapter Board Recognizes Member/Volunteer at beginning of Chapter Meeting within the Welcome/Introduction Slides. At start of each Chapter meeting the Introduction Slides recognizes all new Members and Renewing Memberships.

4.2 The chapter offers a job board, consultant referral service, resume workshop, or other service(s) not included in your chapter's member benefits. (n=76)

	Count	Percentage of Respondents
True	62	81.6%
False	14	18.4%

What service does your chapter offer? (n=62)

	Count	Percentage of Respondents
Consultant referral services	16	25.8%
Job board	55	88.7%
Resume review workshop	12	19.4%
Other	14	22.6%

If "Other," please list the services your chapter offers:

- We start every event and meeting with an "Open Opportunities" platform. Attendees looking for an opportunity (job, mentorship, etc) can speak to what opportunities they are seeking, and anyone who knows of an open role (like for our board or a job, etc.) can share the details of the opening.
- We have a Career Management SIG which provides networking opportunities.
- We had author Steve Dalton host a session on the 2-hour Job Search and it was free to both members and non-members
- Slack Channel
- Resume coaching in Career Transition SIG
- Mentorship program, Consultants Mastermind program
- Mentoring match program
- Mentor Now
- Job Seekers Power Hour - in-person networking/support for those in transition
- Job Seeker rate and Transitioning into L&D Series
- <https://atdvt.wildapricot.org/sys/website/?pageId=18150>
- Consultant Directory
- Career SIG; Sales Enablement SIG
- Active Members Only can access the Job Tab on Chapter Website:
<https://www.atdsmokymountain.org/Jobs>

4.3 The chapter hosts an orientation for new members. (n=76)

	Count	Percentage of Respondents
True	60	78.9%
False	16	21.1%

How is the new member onboarding delivered? (n=60)

	Count	Percentage of Respondents
In-person	9	12.5%
Virtual	52	72.2%
Hybrid	11	11%

What is the program frequency? (n=60)

	Count	Percentage of Respondents
Annually	1	1.7%
Monthly	12	20%
Quarterly	14	23.3%
Twice a year	5	8.3%
On-demand	22	36.7%

Other	6	10%
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If "other," please explain:

- We held it quarterly in 2024 and 3 times in 2025
- We held an Open House for new and existing members to get the most out of their membership and seek out volunteer opportunities.
- New member email with appropriate information about the chapter website, meetings, benefits, etc.
- Every new member receives a personal welcome email with important chapter information to get started.
- Bi-monthly
- As needed - Scheduled quarterly based on registration

What content is included in the onboarding? (n=60)

	Count	Percentage of Respondents
ATD overview	56	91.7%
Chapter background	55	93.3%
Member benefits	58	96.7%
Overview of events	56	93.3%
Power Membership	58	96.7%
Volunteer opportunities	55	91.7%
Other	7	11.7%

If "other," please describe additional onboarding content:

- We take time to discuss with the new member their background, accomplishments and what they would like to gain from being part of Rochester ATD. This helps guide our suggestions for participation for them and also assists in our developing services and programs for our members.
- Personal invitation to connect to board members.
- Networking opportunities within Chapter Member Resources (events and Slack community); ATD Education in-person events in Phoenix
- Networking and helping the group get to know one another.
- ND ATD website navigation
- Meet two different board members (rotating) Virtual navigation tour of the ATD GC website
Logging in for the first time WIIFM to log in periodically Member directory Job board Email them a thank you note for attending with key links
- Includes a link to complete chapter's new member survey.

- 4.4 The chapter tracks the retention rate of its members and determines a target retention rate to meet annually. (n=75)

	Count	Percentage of Respondents
True	48	64%
False	27	36%

- 4.3 The chapter makes its membership available on the ATD Store. (n=76)

	Count	Percentage of Respondents
True	72	94.7%

False	4	5.3%
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4.4 The chapter creates awareness about volunteering for the chapter and open positions. (n=76)

	Count	Percentage of Respondents
True	76	100.0%
False	0	0%

Volunteer recruitment resources include: (n=76)

	Count	Percentage of Respondents
Announcements at chapter events	71	93.4%
Dedicated webpage with open volunteer positions	43	56.6%
Volunteer fair/event	5	6.6%
Volunteer job descriptions	44	57.9%
Volunteer marketing through social media and email	57	75%
Webinar	8	10.5%
Other	14	18.4%

4.5 The chapter achieves a joint chapter/ATD membership rate of 35 percent or higher while meeting the 20 joint member minimum. (n=75)

	Count	Percentage of Respondents
True	63	84%
False	12	16%

4.6 The chapter identifies those activities most impacting its joint membership rate. (n=76)

	Count	Percentage of Respondents
True	46	60.5%
False	30	39.5%

4.7 The chapter holds a membership campaign to recruit prospective members. (n=76)

	Count	Percentage of Respondents
True	59	77.6%
False	17	22.4%

PROGRAMMING

5.1 The chapter offers a mentoring program/initiative for its members. (n=76)

	Count	Percentage of Respondents
True	21	27.6%
False	55	72.4%

How long is your program?

- 8 weeks
- 3 months
- 4 months
- 5 months

- 6 months
- 6-12 months
- 7 months
- 1 year
- As needed
- Ongoing
- Lunch once a month

How many mentees did you have? (n=20)

	Count	Percentage of Respondents
0	3	15%
1–4	4	20%
5–9	4	20%
10–14	6	30%
15–19	2	10%
20 or more	1	5%
Mean = 9 Mentees		

How many mentors did you have? (n=20)

	Count	Percentage of Respondents
0	2	10%
1–4	8	40%
5–9	5	25%
10–14	4	20%
15–19	1	5%
20 or more	0	0%
Mean = 6 Mentors		

5.2 The chapter uses the Talent Development Capability Model™ in program development. (n=76)

	Count	Percentage of Respondents
True	73	96.1%
False	3	3.9%

5.3 The chapter hosts MORE THAN six professional development events each year. (n=76)

	Count	Percentage of Respondents
True	74	97.4%
False	2	2.6%

How many networking events did the chapter hold in 2025? (n=70)

	Count	Percentage of Respondents
0	1	1.4%
1–4	35	50%
5–9	18	25.7%
10–14	12	17.1%
15–19	2	2.9%
20 or more	2	2.9%
Mean = 6.01 networking events		

How many special interest groups (SIG) events did the chapter hold in 2025? (n=70)

	Count	Percentage of Respondents
0	19	27.1%
1–4	20	28.6%
5–9	13	18.6%
10–14	6	8.6%
15–19	3	4.3%
20 or more	9	12.9%
Mean = 6.97 SIG events		

How many geographic interest groups (GIG) events did the chapter hold in 2025? (n=61)

	Count	Percentage of Respondents
0	51	83.6%
1–4	5	8.2%
5–9	5	8.2%
Mean = 0.72 GIG events		

How many webinar events did the chapter hold in 2024? (n=70)

	Count	Percentage of Respondents
0	5	7.1%
1–4	13	18.6%
5–9	25	35.7%
10–14	9	12.9%
15–19	5	7.1%
20 or more	13	18.6%
Mean = 12.4 webinars		

- 5.4 The chapter hosts or partners with other chapters to host a conference for its members and prospects. (n=76)

	Count	Percentage of Respondents
True	35	46.1%
False	41	53.9%

What was your conference theme?

- Value
- Unlocking Belonging
- Turning Insights into Impact
- The Future of Work
- Taking Care of Business: Building Relevance in the Age of Disruption
- Subway to Success
- Southwest Learning Summit
- Learning Revolution; longer annual event with multiple sessions.
- Leading The Way
- L&D Order Taker No More: Become a Strategic Business Partner
- Innovate and Thrive: The Next Chapter
- Innovate and Thrive--the Next Chapter
- Innovate and Thrive
- Innovate & Thrive the Next Chapter
- Innovate & Thrive - The Next Chapter
- Innovate & Thrive - The Next Chapter
- Igniting Possibilities
- Future Ready Talent-Resilience in Action
- Future is Now
- Future Forward
- Foundations of the Future

- Elevating Talent, One Fiesta at a Time
- Elevating performance, empowering people
- Culture Heroes
- Cultivating Resilient Talent
- Cultivating Resilient Talent
- Color Outside the Lines
- Brewing a Better Workplace
- Blueprint for Excellence
- ATD Learning Conference: IlluminATeD: Shining a Light on Learning
- AI & Human Element / Active Learning
- Alignment Summit where people, purpose and performance meet

How many people attended the conference? (n=31)

	Count	Percentage of Respondents
1–49	3	9.7%
50–99	11	35.5%
100–149	6	19.4%
150–199	7	22.6%
200 or more	4	12.9%
Mean = 122 people		

- 5.5 The chapter offers study groups for the Associate Professional in Talent Development (APTD®) and/or Certified Professional in Talent Development (CPTD®). (n=74)

	Count	Percentage of Respondents
True	20	27%
False	54	73%

What type of study group does the chapter offer? (n=20)

	Count	Percentage of Respondents
APTD	7	28%
CPTD	18	72%

On average, how many APTD study groups did your chapter run in 2025? (n=7)

	Count	Percentage of Respondents
0	1	14.3
1	2	28.6%
2	3	42.9%
16	1	14.3%
Mean = 3.4 study groups		

What is the average number of participants per APTD study group? (n=3)

	Count	Percentage of Respondents
0	1	14.3%
1–10	4	57.2%
11–20	2	28.6%
Mean = 9 participants		

On average, how many CPTD study groups did your chapter run in 2025? (n=17)

	Count	Percentage of Respondents
0	1	5.9%

1	4	23.5%
2	10	58.8%
5	1	5.9%
16	1	5.9%
Mean = 2.7 study groups		

What is the average number of participants per CPTD study group? (n=17)

	Count	Percentage of Respondents
0	1	17.6%
1–4	6	35.3%
5–9	5	29.4%
10 or more	5	29.4%
Mean = 7 participants		

5.6 The chapter hosts its own awards program (n=76)

	Count	Percentage of Respondents
True	23	30.3%
False	53	69.7%

What awards categories do you provide? (n=20)

	Count	Percentage of Respondents
Company	9	45%
Consulting	4	20%
Individual	14	70%
Professional Achievement	10	50%
Nonprofits	3	15%
Work teams	5	25%
Other	8	40%

If “Other,” please list the categories of the chapter’s awards program:

- Volunteer of the Year
- Volunteer appreciation
- Membership scholarships for CPTD/APTD and board awards
- Member engagement awards.
- Innovation
- Emerging Talent Development Leader Culture Champion Non-Profit Champion Influencer of the Year
- Career Development, Change Management, Customer Service Training, Leadership/Management Development, Performance Improvement/Performance Consulting, Sales Enablement (team or company for those) Individual Awards: Rising Star, Masterful Mentor, Visionary
- Awards are presented to organizations in 9 categories

5.7 The chapter collaborates with other chapters to plan and host joint programming. (n=75)

	Count	Percentage of Respondents
True	47	62.7%
False	28	37.3%

COMMUNICATION

6.1 The chapter communicates with its membership about non-programming information. (n=75)

	Count	Percentage of Respondents
True	72	96%
False	3	4%

What does the chapter use? (n=71)

	Count	Percentage of Respondents
Blog	10	14.1%
Email	64	90.1%
Facebook	28	39.4%
Instagram	18	25.4%
LinkedIn group	64	90.1%
Newsletter	51	71.8%
Twitter	3	4.2%
YouTube	14	19.7%
Video Blog	2	2.8%
Slack	14	19.7%
Other	12	16.9%

What “other” communication tools does the chapter use?

- WhatsApp for committees such as Influencers, Leaders, and Champions of Learning, Bluesky
- Provided via slide decks at all in-person events.
- Podcast
- Members Only page
- LinkedIn Page
- LinkedIn page
- LinkedIn Page At in-person and virtual events, non-programming items are discussed with members by the board
- LinkedIn Company Page for CVATD
- Linked In page, Tumblr
- <https://www.tddallas.org/>
- Home Page of Chapter Website: <https://www.atdsmokymountain.org/>
- GroupMe

6.2 The chapter has a targeted communication strategy and plan (including social media) to communicate with chapter prospects and members. (n=75)

	Count	Percentage of Respondents
True	71	94.7%
False	4	5.3%

6.3 The chapter provides a member-only section through the chapter’s website or social media. (n=75)

	Count	Percentage of Respondents
True	73	97.3%
False	2	2.7%

Select the information provided behind the member gateway or social media channels used. (n=73)

	Count	Percentage of Respondents
Board meeting minutes	46	63%
Event materials	46	63%
Governance documents	37	50.7%
Job board	42	57.5%
Member directory	54	74%
Mentoring	5	6.8%
Other	17	23.3%

6.4 The chapter participates in and promotes Employee Learning Week. (n=75)

	Count	Percentage of Respondents
True	41	54.7%
False	34	45.3%

What did your chapter do to support Employee Learning Week (ELW)? (n=41)

	Count	Percentage of Respondents
Hosted a themed event	16	39%
Hosted a webinar	14	34.1%
Organized a relevant communications plan	18	24.3%
Organized an awards program	5	12.2%
Received a state proclamation	4	9.8%
Other	17	41.5%

If "Other," please describe what your chapter did for ELW:

- We hosted two events. One in-person and one virtual that week.
- We facilitated an organization challenge to submit how they highlighted and celebrated Employee Learning Week at their organization, and awarded the best submission in our annual awards program in January.
- Social Media posts
- Promoted through social media
- Promote via chapter social channels
- Promote and maintain a page on our site and promote through LinkedIn <https://tdkc.org/page-18228>
- Posted on social media
- Hosted a networking event to attract new members and to communicate awarding of the State proclamation to the membership and potential members.
- Hosted 3 webinars during the week
- Held a networking mix and mingle event to build community.
- Engaged membership through member's nest LinkedIn page with learning opportunities and discussions about learning practices.

- Engaged members via social media prompts and discussions
 - Employee Learning Week is an opportunity to demonstrate our commitment to talent development, which is more important than ever. During Employee Learning Week, December 1 – 5, 2025, we will highlight the learning and development opportunities you can access as a member through a series of LinkedIn posts on our ATD Puget Sound chapter page. Throughout the week, we will be sharing questions and insights to give everyone a chance to reflect on and highlight their own learning initiatives. We invite you to participate by reading our posts each day and sharing how you drive learning and development within your organization, and for yourself! Follow us on LinkedIn ATD Puget Sound and get ready to make your voice heard.
 - Email promotions
 - e-Blast (multiple) to all "Contacts" promoting ELW Quarterly Newsletter Home Page of Website: <https://www.atdsmokymountain.org/>
 - Collaborated with Central FL for a week-long series of events.
 - Announced on social media
-