

CHAPTER AFFILIATION REQUIREMENTS (CARE) PLUS LEVEL ELEMENT MATRIX

CARE Plus is an optional tier in which a chapter should complete at minimum the number of items noted in each category. To be CARE Plus achieved, a chapter must complete the required number of items in each category in addition to achieving CARE at the foundational level. For questions, please contact your [chapter relations manager](#) (CRM).

CARE Element	Why	How
+ BOARD OF DIRECTORS (Select 4)		
<p>Board Member Onboarding: Chapter provides a defined orientation or onboarding process for new board members.</p>	<p>Having a clear onboarding process for new board members ensures a smooth transition and better understanding about how the board operates. It enables newer board members to make an impact sooner and sets up the board for success.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> Host an onboarding retreat for the new board members. Create a folder or shared drive containing important documents for the new board members. Use ATD onboarding road maps to connect new board members with ATD resources that are critical to their position. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> Chapter Leader Community: Onboarding Resources Chapter Leader Onboarding Checklist Chapter Leader Onboarding Webcast Onboarding Toolkit <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> Central New York: Leadership Team Onboarding: On Your Own with Sample Onboarding PowerPoint and Process Document Nebraska: Operations Manual SOS and Operations Manual

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<p>Succession Plan: Chapter has a succession strategy for identifying and filling board member positions.</p>	<p>Having a succession strategy for the board is essential for the continuation of strong leadership for the chapter.</p>	<p>Recommendations for how to accomplish:</p> <ul style="list-style-type: none"> • Create a plan with the board to identify future leaders within the chapter. • Get to know your members and volunteers to connect them with open roles that meet their interests, skill level, and professional development goals. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Chapter Leader Community: Succession Planning Resources • Succession Planning Toolkit <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Los Angeles: Succession Planning Program • Nebraska: Timely Succession Planning, Candidate Interview Process, and Succession Planning Worksheet
<p>Recruitment Strategy: Chapter has a volunteer recruitment strategy in place for positions that support board work.</p>	<p>Chapter volunteers outside of the chapter board assist with the programs of the chapter. Recruitment of these volunteers and having a plan in place to do so ultimately will be an asset to the chapter. Active volunteers are also good candidates for future board positions.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Develop micro volunteer opportunities that don't require lengthy time commitments, such as a greeter at a meeting or newsletter copy writer. • Maintain an archive of those who volunteered for the chapter in any capacity to draw upon for future opportunities. • Create formal or informal committees to support the work of specific directors or vice presidents on the board. • Host a volunteer fair to promote open positions and the benefits of volunteering.

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		<p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • ALC Presentation: Keys to Building a Culture of Recruiting • Quick Recruiting Tips • Recruiting Dashboard and Candidate Tracker • ROI of Volunteer Leadership • Elevate Your Recruiting Message Webinar <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Kansas City: Annual Volunteer Social Media Campaign and Sample Graphic • Charlotte: Volunteer Fair • New York City: Using Associate Vice President (AVP) to Attract Volunteers and AVP Position Description • New York City: Using Instagram to Promote Board Roles and Sample Posts • Puget Sound: New Board Succession Management Process with Sample Board Deskbook
<p>National Advisor for Chapters (NAC) Area Calls: At least one board member (excluding paid administrators) attends a NAC area call.</p>	<p>Attending an area call with the chapter’s NAC allows the chapter leaders to learn what is happening with other chapters in their area and what is going on at a national level. It creates a connection with the participating chapter leaders, the NAC, and ATD chapter services.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Create a sign-up sheet for each monthly meeting so at least one board member participates on an area call. • Create a board role to liaison with ATD national including chapter services and NAC. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • td.org/nac

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		<p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Bay Colonies: VP of Strategy Role for Past President
<p>ATD Chapter Leaders Conference (ALC): Chapter has a board member(s) present annually at ALC.</p>	<p>ALC is an opportunity for chapter leaders to network, share best practices, and learn from other chapter leaders. Through the conference chapter leaders receive onboarding and can bring back various ideas to implement at their chapter.</p> <p>Representation is important at ALC because it connects the chapter back to ATD’s mission and values.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Submit a proposal to speak at the conference. Selected facilitators receive complimentary registration. • Budget for registration for and travel to the conference for at least one board member. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Convince Your Boss Letter • td.org/alc <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Nebraska: Process for ALC Sponsorship and Financial Support Proposal • Pikes Peak: Bring ALC to Members
<p>Engagement of Past Presidents: Chapter has an advisory board or council that involves past presidents in chapter activities.</p>	<p>As previous leaders of the chapter, keeping past presidents engaged supports future boards and encourages continued participation in the chapter.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Develop a specialized or ad hoc role for the immediate past president based on their areas of interest to maintain their engagement. • Send personal invitations to past presidents to chapter events and meetings. • Create an advisory group that the chapter board can turn to for counsel. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • td.org/planforsuccess

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		<p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Bay Colonies: VP Strategy Role for Past President • Houston: Engaging Past Presidents • Nebraska: Past Presidents: Keeping Them Active and Involved
<p>Strategic Planning: Chapter board meets to plan for the future.</p>	<p>Developing a strategic plan for the future of the chapter assists with the board’s goals for the year. Strategic planning helps your chapter develop the right goals and targets and help everyone focus their efforts into meeting them.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Schedule a dedicated board meeting in the beginning of the year to craft this strategy. • Utilize an outside moderator to facilitate conversation. <p>Where can I go for additional information?</p> <ul style="list-style-type: none"> • BoardSource: Strategic Planning • Change Agility Toolkit • Strategic Planning: Getting From Here to There <p>Samples from other chapters:</p> <ul style="list-style-type: none"> • Sharing Our Success: Strategic Planning • Los Angeles: Biannual Strategic Planning Process and Sample Strategic Plan • Research Triangle Area: Strategic Planning with CARE with Strategic Planning Template and Care Tracker Template
<p>Sharing Our Success (SOS): Chapter board submits a best practice to the SOS program.</p>	<p>The SOS program helps chapters improve by sharing easy-to-use ideas, resources, and practices. Sharing knowledge with the wider community enables chapters to enhance their impact while fostering ongoing learning and collaboration. Chapters who participate earn</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Visit the SOS page to read more about the program and submission criteria. • Meet with the board to discuss possible SOS ideas. • Browse other SOS submissions for inspiration and to ensure that the chapter’s submission is unique.

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	<p>national recognition for their outstanding efforts and, if CARE achieved, become eligible to be chosen as Chapter of the Month, which includes additional recognition and a cash prize. By sharing chapter successes, chapters can inspire and learn from one another, promoting excellence across the board.</p>	<ul style="list-style-type: none"> • Complete the SOS Submission Form. • Contact the chapter’s Chapter Relations Manager or a member of the Chapter Recognition Committee with any questions. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • td.org/chapters/clc/sos • td.org/chapters/clc/chapter-recognition-committee
+ GOVERNANCE (Select 2)		
<p>Standard Operating Procedures (SOPs): Chapter board annually maintains and updates its SOPs or as needed.</p>	<p>SOPs are important for the chapter board so it can ensure a smooth transition of responsibilities. It allows the chapter to have consistency during board changes.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Meet as a board to decide which procedures of the chapter should be documented. • Delegate the work among the board by assigning SOP development to the board member in charge of the function. • Meet every other quarter to keep SOPs up-to-date. • Share SOPs with new board members during transitions. Incorporate any unanswered questions from new board members into the document. <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • South Carolina: Making VP of Finance EZ and SOP for Filing 990-N and 990-EZ Tax Returns • Central Ohio: Annual Conference SOP with Logistics Checklist • Nebraska: Operations Manual

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<p>Bylaws Review: Chapter board annually reviews its bylaws, including a review of the bylaws as part of board member onboarding.</p>	<p>Chapter bylaws are the rules by which the organization is governed. They set forth the structure of the organization and guide the board in the conduct of its business. Bylaws should be reviewed by the board every year and amended whenever there are significant changes in the chapter's mission or operations.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> When onboarding new board members, include a copy of the chapter's bylaws in their onboarding documents. At the first board meeting of the year, it is recommended that the chapter president review the bylaws and their importance with the full board. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> Model Bylaws for ATD Chapters
<p>Board Transparency: Chapter makes board meeting minutes and summaries available to members.</p>	<p>Chapter board meetings are for chapter leaders to discuss the operations and future of the chapter. The board meeting minutes serve as an official and legal record of the decisions and actions taken by the board. Chapters are encouraged to make these minutes available to members to keep them informed and engaged with the chapter.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> Assign a board member to take meeting minutes. Post the meeting minutes online, behind a member wall, on a shared drive, or make them available upon request. With an emphasis on transparency, invite chapter members to attend an in-person board meeting. <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> New York City: Board Meeting Position Status Report SOS with Minutes Template and Status Report Template Valley of the Sun: Board Meeting Minutes Collaboration Through Google Docs Cascadia Board Meeting Minutes
<p>Central Repository: Board maintains a central repository or document library for archiving important chapter documents.</p>	<p>Records that have been archived may need to be used or audited in the future. For historical purposes, it helps the chapter reconnect with their past.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> Collect and scan all chapter documents to electronically archive them.

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		<ul style="list-style-type: none"> • Create a filing system to organize documents. • Create a standard operational procedure (SOP) for organizational benefit and future use. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Dropbox • Google Drive • Wild Apricot: Managing Files <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Baton Rouge: The Way We Were: Capturing and Archiving Your Chapter's History <ul style="list-style-type: none"> ○ Information on Organizing Digital Files ○ Record Retention Guidelines and Principles • New York City: Knowledge Center on Wild Apricot • Rocky Mountain: G Suite for Nonprofits • Sharing Our Success: Central Repository
+ FINANCE (Select 3)		
<p>Cash Reserve: Chapter has approximately three to six months of operating expenses set aside for emergencies.</p>	<p>Having three to six months of operating expenses for the chapter will provide a financial safeguard to use when unexpected costs come up or when revenues are down.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Perform an analysis of the chapter's risks. • Keep track of the chapter's budget and how much is in savings. • Establish your target reserves level and funding approach. • Create a reserves policy. Meet with the board to create and communicate a plan on how to gradually save funds.

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		<p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Chapter Finance Toolkit • Operating Reserves for Nonprofits <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Baton Rouge: Monthly Financial Reporting with Sample Budget • Central Iowa: Maximizing Chapter Finances and Investment Strategy Spreadsheet
<p>Risk Assessment: Chapter board completes a risk assessment and reviews it annually.</p>	<p>As an ATD chapter it is important that a board look at the risk faced as a chapter, what the board is doing to minimize risk, and what its plans are if an activity occurs that negatively affects the chapter.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Meet with the board to accomplish the risk assessment together. All board members should weigh in on potential risks to the chapter. • Review the assessment at the first board meeting of the year and make any changes necessary. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Chapter Risk Assessment Guide • Risk Assessment Template <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Fort Worth/Mid-Cities: Risk Assessment • Dallas: Round Robin Risk Assessment • San Diego: Risk Management with Template
<p>Financial Support for Board Development: Chapter budgets to send board members to ATD Chapter Leaders Conference (ALC) or covers cost of ATD membership.</p>	<p>Saving money to assist with the chapter board’s talent and leadership development allows the chapter to benefit from investing in their own members.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Introduce a line item to cover the expenses associated with ALC attendance or ATD national membership for at least one board member.

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		<ul style="list-style-type: none"> • Consider asking your organization to cover the costs. Takeaways learned at ALC can also benefit chapter leaders in their full-time roles. • Demonstrate the value of ALC to your members by writing a summary of your experience, connecting the dots to newly launched initiatives, or holding a session about what you’ve learned. • Leverage professional development funds for board members as a recruitment tool. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Convince Your Boss Template <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Nebraska: Process for ALC Sponsorship and Financial Support Proposal • Pikes Peak: Bringing ALC to Members
<p>Partnership: Chapter has a strategy that identifies, recruits, and maintains partnerships to support chapter programming and operations.</p>	<p>Strategic partnerships benefit chapters, members, and contacts. Partnerships allow chapters to deepen ties with other organizations, foster collaboration and longevity, and offer services that benefit their members.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Determine your chapter’s strategic need and the desired result from the collaboration. • Identify potential organizations to collaborate with and begin conversations. • Consider practical implementation challenges. Discuss the strengths, weaknesses, opportunities, threats, and challenges of aligning with the organization. • Create the memorandum of understanding. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Working With Partners

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		<p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Metro DC: Partnership Model with Partnership Agreement Template and Sample Partnership Model • Cascadia: Partnership with UMU • Nebraska: Creating a Director of Partnerships with Sample Position Description • Pikes Peak: Sponsorship and Partnership Process with Sample Intro Letter and Sponsorship Tiers • Southeastern Wisconsin: Excellence in Strategic Partnerships
<p>Sponsorship: Chapter has sponsors to support chapter programming and operations.</p>	<p>Sponsorship support can help your chapter financially. Your members are the sponsor’s potential clients, and the chapter can help the organization connect to talent development professionals in your region. Sponsoring your chapter will allow companies to share their products or services that support talent development.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Target companies that are familiar with or active in sponsorship. • Target sponsors of other events in the talent development industry. They have a demonstrated interest in reaching people in the industry. • Target competitors of sponsors. Competing companies target the same or similar audiences, so when one company within a particular category sponsors an event, the competition will likely want to get involved as well. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Working With Partners <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Greater Atlanta: Revamping Your Chapter Sponsorship Packet with Sample Sponsorship Packet and Sponsorship Grid

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		<ul style="list-style-type: none"> • Greater Cincinnati: Chapter Sponsorship Program and Solicitation Templates • Hawkeye: Building Value for Event Sponsors • Houston: Past President Engagement • Kansas City: Gamification of Fall Conference • Pikes Peak: Sponsorship and Partnership Process with Sample Intro Letter and Sponsorship Tiers
+ MEMBERSHIP (Select 6)		
<p>Recognition: Chapter has a member and volunteer recognition or spotlight program.</p>	<p>Member and volunteer recognition are important for membership satisfaction. Members and volunteers give their time to the chapter in different ways. Recognition gives members a sense of accomplishment.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Create a volunteer of the month program through which you can highlight their hard work online or during a member meeting. • Create a recognition submission form to pick a member to highlight or choose to spotlight new members as they join the chapter. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Developing a Chapter Awards Program <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Madison: Thank You Mailing Surprise • New York City: Recognize Chapter Volunteers with Digital Badges • Orange County: Volunteer of the Month
<p>Services: Chapter offers a job board, consultant referral service, resume workshop, or other service(s) not included in your chapter's member benefit.</p>	<p>Chapters are a great resource for its members. Offering an online job board or other professional development resources to members is a great way to expand upon and diversify your chapter's benefits. It offers</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Host a job board on the chapter's website • Consider launching a consultant's directory to highlight the services of your members to other organizations.

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	members another reason to renew their membership.	<p>Where can I go for additional information?</p> <ul style="list-style-type: none"> • ATD Job Bank • ATD Buyer’s Guide <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Greater Atlanta: Job Board • Metro DC: Career Services Portfolio • Metro DC: Consultant Referral Service
<p>New Member Orientation: Chapter hosts an orientation for new members.</p>	<p>New member orientation gives new members an introduction to what they will benefit from their membership. An orientation helps ensure that members make the most out of their membership and gives them a chance to make connections with seasoned and new members.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Consider the orientation format (in person, virtual, or on-demand) and what would best meet your members’ needs. • Share best practices about how new members can make the most of their member benefits and peer contacts. • Leverage employee onboarding best practices to help craft and organize your content for members. • Use the orientation as an opportunity to get feedback on the new members’ goals, challenges, and needs to focus accordingly on your content. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Creating a Successful Onboarding Framework <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Central Indiana: Engagement Through New Member Orientation • Central Pennsylvania: On-Demand New Member Orientation

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		<ul style="list-style-type: none"> • Kansas City: Orientation and Engagement with Sample Program Information, Initial Email Template and Follow-up Email Template
<p>Retention: Chapter tracks the retention rate of its members and determines a target retention rate.</p>	<p>Retention is a function of marketing and a great membership experience. A chapter struggling to keep members will commit extra funds to recruitment efforts until the chapter identifies and addresses the underlying cause of members not renewing.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Determine how to properly calculate retention rates (divide the number of renewed members by the number of members up for renewal). • Calculate retention monthly and incorporate the process into your SOPs. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Maximize Chapter Value While Minimizing Costs <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • New York City: Chapter Goals & Dashboard with Sample Goals and Sample Dashboard
<p>Chapter Membership on the ATD Store: Chapter makes its membership available on the ATD Store site.</p>	<p>Making your chapter membership's available via the ATD Store increases the visibility of your chapter's membership, streamlines the customer experience by allowing the purchasing of both memberships in one transaction, and allows members to align their membership end dates.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Review the preliminary information on td.org/membershiponthestore including the archived webcast. • Schedule a call with Lauren Sharrock to review the process. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Chapter Membership on the ATD Store Webpage <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Tulsa: Launch Your Chapter to Power Member Super Star Status

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<p>Volunteer Recruitment: Chapter creates awareness around volunteer opportunities with the chapter and open positions.</p>	<p>Volunteers are the lifeblood of a chapter. Recruitment should be a year-long process as it gives your chapter the power to do more for its members, create a more engaged and diverse membership, and increases awareness and understanding of your chapter.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Post volunteer opportunities detailing the role description and time commitment on the chapter’s website. • Highlight volunteer opportunities at chapter meetings and events. • Add a question to your membership application inquiring as to whether someone has interest in volunteering for the chapter. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Volunteer Recruitment Resources • Volunteer Recruitment Webpage Template HTML code and Job Aid <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Cascadia: Becoming a Welcoming Organization • Houston: Showing and Sharing It All • Los Angeles: Succession Planning Program • Metro DC: Volunteering • Greater Atlanta: Volunteer with the Chapter
<p>Power (Joint) Membership: Chapter achieves a joint chapter and ATD membership rate of 45 percent or higher while also meeting the 20 joint member minimum.</p>	<p>Having a substantial joint chapter/ATD membership promotes the growth and health of the talent development profession as well as the association and chapters. According to ATD membership satisfaction surveys, joint members are more likely to renew their membership. These members tend to actively participate and contribute to their chapters.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Use and maximize the membership tools from ATD, especially “Power Member” resources available at td.org/jointmembership. • Request a state list of ATD members to invite potential members to join the chapter. Offer incentives such as a trial chapter membership, voucher for a free meeting, discounted pricing to a

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		<p>workshop if combined with membership, and so on to ATD members.</p> <ul style="list-style-type: none"> • Share benefits and encourage joint membership during chapter programs and in chapter communications. This could also include advertising ATD programs or giving out ATD brochures at chapter meetings. • Request your chapter’s joint membership percentage by contacting your CRM. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Marketing Materials Request • Power Member Marketing Materials • td.org/JointMembership <p>Samples From Chapters:</p> <ul style="list-style-type: none"> • Sharing Our Success (SOS) submissions: Joint Membership
<p>Power Member Activities: Chapter identifies those activities having the most impact on its joint membership.</p>	<p>Chapters that focus on joint membership promotional activities tend to have more joint members. These activities assist chapters with planning for success in this area. Chapters that evaluate which activities are most impactful are working strategically and smartly to generate results.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Use the CARE Planning Tool to track your progress. • Identify activities that resonate with your chapter and its members by tracking their impact. • Familiarize yourself with ATD member benefits to determine how they may fit into the chapter’s programming or professional development strategies. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Joint Membership Activities Job Aid <ul style="list-style-type: none"> ◦ PDF ◦ Webpage • td.org/jointmembership

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		<p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Sharing Our Success: Joint Membership
<p>Membership Campaign: Chapter holds a membership drive to recruit prospective members.</p>	<p>While performed in various ways, membership marketing campaigns are critical to your chapter’s continued success. These campaigns tend to feature multiple touch points to get the chapter’s message across and spur action to join.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Consider why you personally joined the chapter and incorporate your story into the campaign messaging. • Consider tying the campaign to an important event for the chapter, such as an anniversary or chapter conference. • Segment your audience to target your outreach. Encourage lapsed members to re-engage, longtime members to spread the word, and contacts to commit to their development. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • td.org/jointmembership • td.org/membershiponthestore <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Sharing Our Success: Membership Campaign
+ PROGRAMMING (Select 3)		
<p>ATD Capability Model: Chapter uses the ATD Talent Development Capability Model in program development.</p>	<p>ATD's Talent Development Capability Model is a framework to guide the TD profession in what practitioners need to know and do to develop themselves, others, and their organizations. Aligning your programming and professional development opportunities with the model helps ensure that the chapter is providing</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Review Capabilities for Talent Development, the ATD publication given to chapters to learn more about the model and the research that went into its development. • Consider how incorporation of the model into the chapter’s work would best benefit members.

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	<p>relevant, meaningful, and effective content to its members and contacts.</p>	<p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • td.org/CapabilityModel • Talent Development Capability Model: Chapter Resources <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Greater Las Vegas: Hosted an Unconference • Greater Atlanta: Capability Model-Based Mentoring • Central Pennsylvania: Capability Conversations • Cuyahoga Valley: Driving Individual Development Using the Competency Model • Los Angeles: Brain Exchange and New Year Networking Mixer
<p>Mentoring Program: Chapter offers a mentoring program or initiative for its members.</p>	<p>Chapters benefit from mentoring programs because they foster a culture of learning and development while providing tangible value to participants. Mentors help mentees learn the ropes, develop relationships, and identify skills that should be developed or improved upon. Mentors are available to share knowledge while developing connections and leadership skills. Mentoring programs also make for a great pipeline for potential chapter leaders.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Focus on a common, manageable theme tailored to the participants. • Understand and address potential barriers to mentoring before designing and initiating a program. • Establish a clear, defined scope and timeline. • Identify and invite credible mentors and participants. • Organize agendas and types of interactions (face-to-face meetings, site visits, LinkedIn groups, workshops, and the like) based on the true needs of the group. • Identify active, motivated, and skilled leaders; consider a third-party facilitator if many individuals will be involved. • Design a system to measure progress.

CHAPTER AFFILIATION REQUIREMENTS (CARE) PLUS LEVEL ELEMENT MATRIX

CARE Element	Why	How
		<p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Engaging Students and New Professionals Toolkit • Five Tips for Successful Mentoring Program Implementation • How Mentoring Programs Help Shape Future Leaders <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Greater Atlanta: Capability Model-Based Mentoring • North Dakota: Virtual Peer Mentoring Groups with FAQs and Sample Meeting Agenda • Metro DC: Mentoring Program
<p>Expanded Programming: Chapter hosts more than six professional development events each year</p>	<p>Chapters offering more than the minimum of six professional development events are providing additional learning opportunities and increasing their value in members’ eyes. Additional programs also help cultivate and sustain connections at these events building community.</p>	<p>Recommendations for How to Accomplish: Consider using any of these development activities:</p> <ul style="list-style-type: none"> • chapter meetings • special interest group (SIG) meetings • geographic Interest Group (GIG) meetings • conferences or workshops • networking events • field visits to corporate universities, workplaces, college campuses, or vendor sites • public forum about training issues • guest speakers or panel discussions • joint program with another professional organization such as SHRM, ISPI, ODN. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • ATD Certification Preapproval • ATD Talent Development Capability Model

CHAPTER AFFILIATION REQUIREMENTS (CARE) PLUS LEVEL ELEMENT MATRIX

CARE Element	Why	How
		<ul style="list-style-type: none"> • ATD Speaker Request Form • ATD Press Authors Information • Explore content on td.org by topic • Speakers Bureau <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Sharing Our Success: Programs and Events • Sharing Our Success: Monthly Meetings • Sharing Our Success: Chapter Meeting Planning
<p>Chapter or Regional Conference: Chapter hosts or partners with other local chapters to host a conference for its members and prospects.</p>	<p>Chapter conferences enable a chapter to provide extended professional development offerings while creating an environment dedicated to learning, community, and resources. Conferences create a new revenue stream and target market for chapters that differs from their monthly programs.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Assess the need for an expanded learning opportunity for your chapter members and contacts. • Establish a committee or team to project manage the effort. • Develop a budget for the conference. • Identify local partners to promote and support the effort. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Area Chapters Leaders Conference Toolkit <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Sharing Our Success: Chapter Conferences

CHAPTER AFFILIATION REQUIREMENTS (CARE) PLUS LEVEL ELEMENT MATRIX

CARE Element	Why	How
<p>Joint Programming: Chapter collaborates with other chapters to plan and host joint programming.</p>	<p>Joint programming allows chapters to pool their resources and expertise to create more impactful programs. By collaborating, chapter members are given access to a wider range of programming and opportunities to expand their personal and professional networks—increasing the value of chapter membership while sharing the workload. Overall, joint programming enhances the member experience while fostering collaborative relationships between chapters and contributing to the development of the wider talent development community.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Research local chapters via the ATD Chapter Locator and reach out to chapter leadership. • Establish clear goals and objectives. • Put together a committee or team to manage the effort. • Create a shared timeline and regular meeting cadence to discuss ideas, plan strategies, and keep everyone updated on the progress. • Define roles and responsibilities. <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> • Partnering with Regional Sister Chapters to Expand Programming
<p>Certification Opportunities: Chapter offers its own study groups for the Associate Professional in Talent Development (APTD) and Certified Professional in Talent Development (CPTD).</p>	<p>Professional development remains a top reason why someone connects with a local chapter or national association. ATD certification enables professionals to differentiate themselves, increase their earning potentials, and broaden career opportunities. A chapter study group makes for another enticing member benefit and also caters to those looking to demonstrate their commitment to the profession.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Review the chapter’s recent member assessment to determine if there is a need for a study group. • Reach out to certified chapter members or leaders who may be interested in facilitating the group. • Review ATD certification and utilize the ATD Certification Toolkit. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • ATD Certification Preapproval • ATD Certification Toolkit • Professional Development Preapproval Application • ATD Certification Study Group Guide <p>Samples From Other Chapters:</p>

CHAPTER AFFILIATION REQUIREMENTS (CARE) PLUS LEVEL ELEMENT MATRIX

CARE Element	Why	How
		<ul style="list-style-type: none"> • Sharing Our Success: ATD Certification Best Practices • Rocky Mountain Chapter Virtual CPTD Study Group • ATD Chapter Study Groups
+ COMMUNICATION (Select 2)		
<p>Member Communication: Chapter communicates with membership about nonprogramming information including via a blog, video blog (vlog), newsletter, and so on.</p>	<p>Communicating the value proposition of your chapter is key to maintaining engagement. While event promotion is key to developing in-person engagement, chapters should also communicate meaningfully with their members outside of these events. There are various tools available to keep members informed and involved. Identify the medium that resonates most with your members.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Review the chapter’s current communication channels and evaluate each channel’s ability to reach your members • Humanize your outreach to develop more meaningful connections via your virtual communications. • Inquire about your chapter members’ communication preferences via your annual member survey. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Follow other ATD chapters on Twitter. • Free Content for Chapter Leaders <p>Samples from other chapters:</p> <ul style="list-style-type: none"> • Central Florida: Off-the-Cuff Video Blog (Vlog) • Greater Philadelphia: Make Your Chapter Newsletters Come Alive • Houston: Showing and Sharing it All • Nebraska: Best Practices for Member Engagement Through LinkedIn
<p>Communication Strategy: Chapter has a targeted communication strategy and plan</p>	<p>An effective communication strategy creates and maintains connections, which allows your chapter to work efficiently toward its goals.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Determine your chapter’s various audiences and needs and WIIFM (what’s in it for me).

CHAPTER AFFILIATION REQUIREMENTS (CARE) PLUS LEVEL ELEMENT MATRIX

CARE Element	Why	How
<p>(including social media) to communicate with prospects and members.</p>	<p>Explaining the strategic focus of the chapter and how it creates value for members helps volunteers understand how their work links directly to the success of the chapter.</p>	<ul style="list-style-type: none"> Segment your chapter communications to target your audiences in different ways. Develop your communication objectives and your approaches. Outline your activities so that you have a comprehensive view of your messaging. <p>Where can I go for additional information?</p> <ul style="list-style-type: none"> Chapter Communications Toolkit <p>Samples from other chapters:</p> <ul style="list-style-type: none"> Sharing Our Success: Communication Strategy
<p>Virtual Member Benefits: Chapter provides a member-only section through the chapter's website or social media platforms.</p>	<p>Making some of your chapter's benefits available virtually ensures that your members are continually finding value in membership even when not at in-person events.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> Use Wild Apricot's central repository to make meeting materials and selected content available to only members. Consider virtual events like networking opportunities or books clubs in which participation is only available to members. <p>Samples From Other Chapters:</p> <ul style="list-style-type: none"> Metro DC: Virtual Networking Happy Hour Series with Sample Agenda Nashville: Supporting Professionals Virtually with Sample Virtual Program List New York City: Knowledge Center on Wild Apricot Pittsburgh: Leveraging National Membership Benefit for Chapter Book Club South Florida: Virtual TD Talks

CHAPTER AFFILIATION REQUIREMENTS (CARE) PLUS LEVEL ELEMENT MATRIX

CARE Element	Why	How
<p>Employee Learning Week: Chapter participates in and promotes Employee Learning Week.</p>	<p>Employee Learning Week is an opportunity for chapters to demonstrate their commitment to talent development by highlighting the important connection between learning and achieving organizational results. Participation in the campaign helps increase the awareness and impact of the profession.</p>	<p>Recommendations for How to Accomplish:</p> <ul style="list-style-type: none"> • Mark your calendars. ELW is always scheduled during the first full week of December. • There are many ways to participate in Employee Learning Week. Determine the method that works best for you. Consider a special chapter meeting or program, receiving a proclamation from your chapter’s government officials, a social media campaign, and so forth. • Share what your chapter did to recognize the week via td.org/ELW. <p>Where Can I Go for Additional Information?</p> <ul style="list-style-type: none"> • Employee Learning Week Chapter Project Plan • Employee Learning Week Press Release • Employee Learning Week Toolkit • td.org/ELW <p>Samples from Other Chapters:</p> <ul style="list-style-type: none"> • Central Ohio: Employee Learning Week Proclamation and Initiative