

2024 Chapter Affiliation Requirements (CARE) Submission Summary



2024 CARE Submission Summary

CHAPTERS REPORTING ON THE 2023 CALENDAR YEAR

2024 CARE SUBMISSION SUMMARY

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If you have any questions regarding the 2024 CARE Submission Summary, please contact:

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SECTION 1: EXECUTIVE SUMMARY

Submission Results

As of the CARE submission deadline date (January 31, 2024):

- 80 out of 82 active chapters (98%) completed the CARE submission process.
- 74 chapters (90%) achieved 100% in all elements. In 2023, 72 chapters achieved 100% in all elements.

Achievement Data

The 74 submitting chapters self-evaluated their percentage of achievement in all 6 CARE Foundational elements.

1. 100 Percent of Achievement

Element	Element Description
Board of Directors	The chapter maintains written descriptions for elected members.
Governance	The chapter's mission, vision, and bylaws align with those of ATD, and the chapter meets the ATD branding guidelines.
	The chapter complies with federal and state reporting requirements.
Finance	The chapter board develops and approves an annual operating budget and makes it available to members.
Membership	
Programming	
Communication	

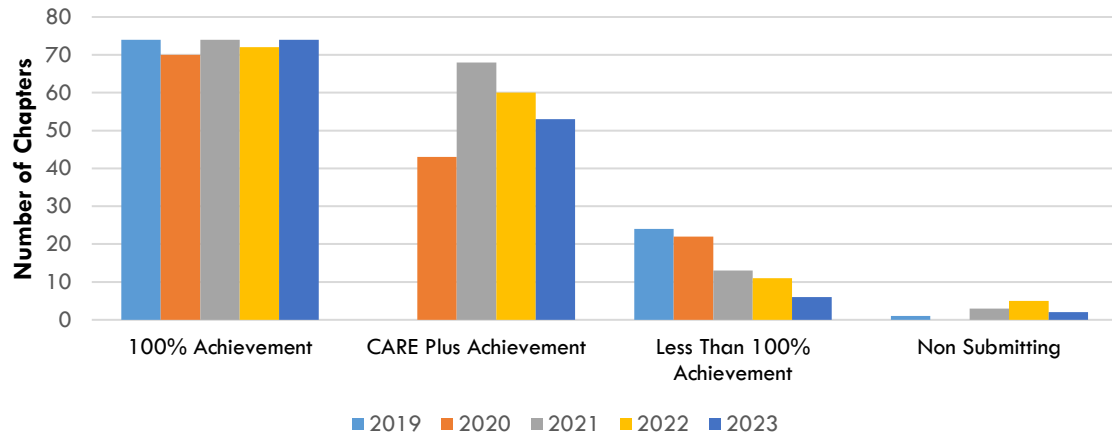
2. Less Than 100 Percent of Achievement

Element	Element Description	Chapter % Achieved
Board of Directors	Chapter submits an incoming 2024 board roster using the Excel template.	98.8%
	The chapter board meets at least once per quarter.	98.8%
	Chapter board members maintain Power membership.	97.5%
Governance	The chapter members participate in the nomination and election of the chapter board.	98.8%
Finance	The chapter must upload the most recent balance sheet and income statement through the survey submission site by January 31, 2023.	98.8%
	Chapter board has an internal or external financial review completed annually by a person or group not directly responsible for managing chapter finances.	97.5%
	Confirm the chapter's EIN on file is accurate.	96.3%
Membership	The chapter must upload its 2023 Chapter Membership Roster.	98.8%
	The chapter board assesses its members' needs and satisfaction levels at least once per year.	97.5%
	The chapter completes 10 activities of the chapter's choice.	97.5%
Programming	The chapter provides at least six professional development activities per year for members.	98.8%
Communication	The chapter maintains a current website with up-to-date information.	98.8%
	The chapter disseminates a communication piece to members at least once per quarter that includes chapter and ATD programs and initiatives.	98.8%
	The chapter board shares the following information with members at least once per year: membership numbers, financial performance, and progress toward annual goals.	96.3%

What Does the CARE Information Tell Us?

The 2023 CARE results for ATD's 82 active chapters were:

Chapter CARE Achievement



SECTION 2: CHAPTER RESULTS

As of the CARE submission deadline date (January 31, 2023):

- 80 out of 82 active chapters (98%) completed the CARE submission process.
- 74 (90%) achieved 100 percent.
- 53 (65%) achieved CARE Plus status.
- 6 chapters (7%) achieved less than 100 percent.
- 2 chapters (2%) did not submit.
- 4 chapters were inactive and were not required to complete the CARE survey.

Chapters That Achieved 100 Percent CARE, as of January 31, 2023:

Brazos Valley	Greater Cincinnati	Memphis
Capital Region	Greater Toledo	Mississippi
Charlotte Area	Greater Twin Cities	Mississippi Valley
Florida Suncoast	Hawaii	Northeast Wisconsin
Golden Gate	Hawkeye	Research Triangle Area
Greater Birmingham	Kentuckiana	Sacramento
Greater Boston	Lake Superior	Southern Connecticut

Chapters That Achieved 100 Percent CARE and CARE Plus, as of January 31, 2023:

Ann Arbor	Fort Worth/Mid-Cities	Northeast Florida
Appalachia	Greater Atlanta	Northern New Jersey
Austin	Greater Las Vegas	Orange County
Baton Rouge	Greater Philadelphia	Puget Sound
Bay Colonies	Greater Richmond	Rochester
Cascadia	Houston	Rocky Mountain
Central Florida	Kansas City	San Antonio
Central Indiana	Long Island	San Diego
Central Iowa	Los Angeles	Smoky Mountain
Central Massachusetts	Madison Area	South Carolina
Central New York	Maine	South Florida
Central Ohio	Maryland	Southeastern Wisconsin
Central Oklahoma	Metro DC	St. Louis
Central Pennsylvania	Mid New Jersey	Tulsa
Chicagoland	Nashville	Valley of the Sun
Cuyahoga Valley	Nebraska	Vermont
Dallas	New York City	West Michigan
Detroit	North Dakota	

Chapters That Did Not Achieve 100 Percent CARE, as of January 31, 2023:

Buffalo Niagara	New Orleans	Puerto Rico
New Mexico	Pittsburgh	Utah

Active Chapters That Did Not Submit a CARE Submission, as of January 31, 2023

Chattanooga Area	Southeastern Virginia
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Inactive Chapters, as of January 31, 2023:

Arkansas	Piedmont	Treasure Valley
Greater Cleveland		

SECTION 3: ANNUAL UPDATE INFORMATION

BOARD OF DIRECTORS

When are your chapter board meetings typically held? (n=80)

	Count	Percentage of Sample Answered
Monthly	68	85.0%
Bimonthly (occurring every two months)	2	2.5%
Quarterly	3	3.8%
Other	7	8.8%

Does your chapter pay for ATD membership dues for one or more chapter board members? (n=80)

	Count	Percentage of Sample Answered
Yes	48	60.0%
No	32	40.0%

When do your incoming board members **officially** begin their terms? (n=80)

	Count	Percentage of Sample Answered
First quarter (January through March)	69	86.3%
Second quarter (April through June)	1	1.3%
Third quarter (July through September)	7	8.8%
Fourth quarter (October through December)	3	3.8%

GOVERNANCE

What types of insurance coverage does your chapter have? Select all that apply. (n=75)

	Count	Percentage of Sample Answered
Directors' and officers' liability insurance	58	73.3%
Event-based insurance coverage	13	17.3%
General liability	48	64.0%
Professional liability	7	9.3%
None	1	1.3%

Is your chapter incorporated? (n=80)

	Count	Percentage of Sample Answered
Yes	60	75.0%
No	20	25.0%

FINANCE

Does your chapter pay for any administration help, such as a management firm or other administrative service? (n=80)

	Count	Percentage of Sample Answered
Yes	33	41.3%
No	47	58.8%

MEMBERSHIP

What was your chapter's average membership number for 2023? (n=81)

	Count	Percentage of Sample Answered
0–49	15	18.5%
50–99	22	27.1%
100–149	19	23.5%
150–199	8	9.9%
200–249	9	11.1%
250–299	4	4.9%
300–349	4	4.9%
Mean = 124.95		

Did your chapter raise dues in 2023? (n=80)

	Count	Percentage of Sample Answered
Yes	7	8.8%
No	73	91.3%

Did your chapter lower dues in 2023? (n=80)

	Count	Percentage of Sample Answered
Yes	1	1.3%
No	79	98.8%

Does your chapter plan to raise dues in 2024? (n=80)

	Count	Percentage of Sample Answered
Yes	9	11.3%
No	71	88.8%

How much are your regular membership dues? (n=80)

	Count	Percentage of Sample Answered
\$25–49	3	3.8%
\$50–74	28	35.0%
\$75–99	26	32.5%
\$100–124	7	8.8%
\$125–149	9	11.3%
\$150 or more	7	8.8%
Mean = \$91.28		

Which of these dues categories does your chapter have? (n=80)

	Count	Percentage of Sample Answered
Group/corporate membership	61	76.3%
Senior member	14	17.5%
Student member	72	90.0%
Young professional	8	10.0%
Other	35	43.8%

How much are your **group or corporate** member dues? (n=52)

	Count	Percentage of Sample Answered
\$25–49	3	5.8%
\$50–74	16	30.8%
\$75–99	12	23.1%
\$100–124	9	17.3%
\$125–149	4	7.7%
\$150 or more	8	15.4%
Mean = \$105.65		

How much are your **senior** membership dues? (n=14)

	Count	Percentage of Sample Answered
\$0–24	2	14.3%
\$25–49	6	42.9%
\$50–74	5	35.7%
\$75–99	1	7.1%
Mean = \$42.21		

How much are your **student** membership dues? (n=72)

	Count	Percentage of Sample Answered
\$0–24	9	12.5%
\$25–49	43	59.7%
\$50–74	15	20.8%
\$75–99	4	5.6%
\$100 or more	1	1.4%
Mean = \$37.20		

How many student members does your chapter have? (n=72)

	Count	Percentage of Sample Answered
Have a student rate but no student members	10	13.9%
1–9	47	65.3%
10–19	12	16.7%
20–29	0	0
30 or more	3	4.2%
Mean = 7 students		

Which of these are requirements for a student to get the student membership rate? (n=72)

	Count	Percentage of Sample Answered
Attend an accredited university or college	57	79.2%
Demonstrate they are taking classes in a talent development-related field	19	26.4%
Demonstrate they are in a degree program in a talent development-related field	11	15.3%
Take a minimum number of credit hours	16	22.2%
Some other criteria	6	8.3%

How much are your **young professional** dues? (n=7)

	Count	Percentage of Sample Answered
\$0-24	1	14.3%
\$25-49	1	14.3%
\$50-74	1	14.3%
\$75-99	4	57.1%
Mean = \$65.43		

Does your chapter provide ATD members a discount on chapter membership? (n=80)

	Count	Percentage of Sample Answered
Yes	29	36.3%
No	51	63.8%

What is the percentage of your discount? (n=26)

	Count	Percentage of Sample Answered
1-9	1	3.8%
10-19	13	50.0%
20-29	7	26.9%
30 or more	5	19.2%
Mean = 20%		

PROGRAMMING

When are most of your regular programs held? Select all that apply. (n=80)

	Count	Percentage of Sample Answered
Morning	27	33.8%
Lunchtime	48	60.0%
Afternoon	8	10.0%
Evening	43	53.8%
Other	6	7.5%

What is the average number of people at your regular monthly chapter meeting? (n=71)

	Count	Percentage of Sample Answered
0-19	39	54.9%
20-39	27	38.0%
40-59	5	7.0%
60 or more	0	0
Mean = 20 People		

What is the approximate registration fee for a **chapter member** to attend a chapter program? (n=75)

	Count	Percentage of Sample Answered
Free	35	46.7%
\$1-9	1	1.3%
\$10-19	10	13.3%
\$20-29	20	26.7%
\$30 or more	8	10.7%
Mean = \$12.09		

What is the approximate registration fee for a **nonmember** to attend a chapter program? (n=74)

	Count	Percentage of Sample Answered
Free	1	1.4%
\$1–9	2	2.7%
\$10–19	12	16.2%
\$20–29	29	39.2%
\$30–39	17	23.0%
\$40 or more	13	17.6%
Mean = \$26.61		

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

	Count	Percentage of Sample Answered
Free	10	20.4%
\$1–49	5	10.2%
\$50–99	10	20.4%
\$100–149	4	8.2%
\$150–199	8	16.3%
\$200 or more	12	24.4%
Mean = \$113.33		

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

	Count	Percentage of Sample Answered
Free	5	10.2%
\$1–49	8	16.3%
\$50–99	6	12.2%
\$100–149	4	8.2%
\$150–199	7	14.2%
\$200–249	5	10.2%
\$250 or more	14	28.6%
Mean = \$151.96		

COMMUNICATION

Which of the following social media channels does your chapter have? (n=80)

	Count	Percentage of Sample Answered
Facebook	58	72.5%
Instagram	24	30.0%
LinkedIn group	77	96.3%
Twitter	29	36.3%
YouTube	21	26.3%
Blog	6	7.5%
Other	8	10.0%
None of the above	1	1.3%

SECTION 4: FOUNDATIONAL ELEMENTS ACHIEVEMENT DATA

BOARD OF DIRECTORS

1.1 Chapter submits an incoming 2024 board roster using the Excel template. (n=80)

	Count	Percentage of Sample Answered
Achieved	79	98.8%
Nonachieved	1	1.3%

1.2 The chapter board meets at least once per quarter. (n=80)

	Count	Percentage of Sample Answered
Achieved	79	98.8%
Nonachieved	1	1.3%

1.3 Chapter board members maintain Power Membership (joint chapter/ATD national membership). (n=80)

	Count	Percentage of Sample Answered
Achieved	78	97.5%
Nonachieved	2	2.5%

1.4 Chapter maintains written position descriptions for elected members. (n=80)

	Count	Percentage of Sample Answered
Achieved	80	100%
Nonachieved	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=80)

	Count	Percentage of Sample Answered
Achieved	80	100%
Nonachieved	0	

2.2 The chapter complies with federal and state reporting requirements. (n=80)

	Count	Percentage of Sample Answered
Achieved	80	100%
Nonachieved	0	

2.3 The chapter members participate in the nomination and election of the chapter board. (n=80)

	Count	Percentage of Sample Answered
Achieved	79	98.8%
Nonachieved	1	1.3%

FINANCE

- 3.1 Chapter must upload its most recent balance sheet and income statement through the survey submission site by January 31, 2023. (n=80)

	Count	Percentage of Sample Answered
Achieved	79	98.8%
Nonachieved	1	1.3%

- 3.2 The chapter board develops and approves an annual operating budget and makes it available to members. (n=80)

	Count	Percentage of Sample Answered
Achieved	80	100%
Nonachieved	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=80)

	Count	Percentage of Sample Answered
Achieved	78	97.5%
Nonachieved	2	2.5%

- 3.4 Confirm the chapter's EIN on file is accurate. (n=80)

	Count	Percentage of Sample Answered
Achieved	77	96.3%
Nonachieved	3	3.8%

MEMBERSHIP

- 4.1 Please upload the 2023 Chapter Membership Roster as of December 31, 2023 (n=80)

	Count	Percentage of Sample Answered
Achieved	79	98.8%
Nonachieved	1	1.3%

- 4.2 The chapter board assesses its members' needs and satisfaction levels at least once per year. (n=80)

	Count	Percentage of Sample Answered
Achieved	78	97.5%
Nonachieved	2	2.5%

- 4.3 The chapter completes 10 joint membership activities of the chapter's choice. (n=80)

	Count	Percentage of Sample Answered
Achieved	78	97.5%
Nonachieved	2	2.5%

PROGRAMMING

- 5.1 The chapter provides members with at least six professional development activities per year. (n=80)

	Count	Percentage of Sample Answered
Achieved	79	98.8%
Nonachieved	1	1.3%

COMMUNICATION

6.1 The chapter maintains a current website with up-to-date information. (n=80)

	Count	Percentage of Sample Answered
Achieved	79	98.8%
Nonachieved	1	1.3%

6.2 The chapter disseminates a communication piece to members at least once a quarter, including chapter and ATD programs and initiatives. (n=80)

	Count	Percentage of Sample Answered
Achieved	79	98.8%
Nonachieved	1	1.3%

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=80)

	Count	Percentage of Sample Answered
Achieved	77	96.3%
Nonachieved	3	3.7%

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=80)

	Count	Percentage of Sample Answered
True	77	96.3%
False	3	3.8%

How is the board member onboarding delivered? Select all that apply. (n=77)

	Count	Percentage of Sample Answered
Hybrid	37	48.1%
In-person	23	29.9%
Virtually	42	54.5%

Approximately what is the frequency of your board member onboarding? (n=77)

	Count	Percentage of Sample Answered
Annually	31	40.3%
As needed	43	55.8%
Monthly	2	2.6%
Quarterly	1	1.3%

In what month(s) does the board member onboarding occur? (n=76)

	Count	Percentage of Sample Answered
January	49	64.5%
February	17	22.4%
March	14	18.4%
April	9	11.8%
May	8	10.5%
June	14	18.4%
July	13	17.1%
August	8	10.5%
September	9	11.8%
October	19	25.0%
November	27	35.5%
December	40	52.6%

What kind of coaching/mentoring does the chapter provide board members? (n=77)

	Count	Percentage of Sample Answered
Board meetings, strategy session, and/or board retreat has time dedicated to board member coaching/mentoring.	68	88.3%
New board members shadow and/or attend board meetings prior to the start of their term.	63	81.8%
Onboarding materials made available to incoming positions	62	80.5%
Outgoing position mentors incoming position.	60	77.9%
President one-on-one	59	76.6%
President team (president, president-elect, past president)	40	51.9%
Other	14	18.2%

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

- We like to build in some team bonding experiences to help expedite building rapport and trust. i.e. Game night
- This depends on the needs of the role and the incoming member.
- The President, The Director of Finance and the Business Manager coordinate onboarding
- The CMATD Board is very supportive and willing to onboard and coach new board members as needed throughout their term. The coaching/mentoring the chapter provides is facilitated through one-on-ones with the Chapter President and Administrator to ensure their engagement and effectiveness. The Google Drive is a repository of onboarding materials as well.
- The Atlanta Chapter provides an annual retreat for both the Board of Directors and the Executive Board. During the Board of Directors Retreat we re-evaluate our strategic goals for the chapter. We also make sure our goals align with our vision and mission statement for the chapter. During our Executive Board Retreat we review and evaluate our operating procedures to make sure they are aligned how to chapter business done most effectively.
- President provides ongoing 1:1 sessions with board members for sharing information, helping them develop goals and objectives, assisting in understanding history of chapter, activities and decisions. Board members are encouraged to collaborate on projects, activities and goals.
- New board members are partnered with another board member to mentor them and provide support until they are comfortable in their role.
- Meetings with the incoming VP of the designated team/committee.
- Job aids, videos
- In some positions, we are currently looking more than two years on talent available so we can begin prepping the person for the possible role.
- Greater Cincinnati Chapter of ATD has an advisor role that is filled by former board member that has extensive historic knowledge of how things work. She is readily available for any board member that needs help and attends strategy sessions with us. President conducts monthly 1:1 with all VP's and Directors are invited quarterly to 1:1 to discuss the strategic plan and answer any questions on processes and procedures
- Checklists and resources for platforms applicable to each role.

- Board members were given access to a Google drive containing all documents produced by their predecessors. Board members were given read-only access to the website so they could become familiar with its functionality as their time permitted before being given edit access.
- All board members participated in two strategic planning sessions in 2023 to map out goals for the year. Additionally, board members meet with the person who previously held the position for transition training to help acclimate them to their new role. Materials and resources are made available to each board member. One-one-one and touchpoint meetings with the president are also available to each board member on an as needed basis.

Who leads the onboarding of new board member(s)? Select all that apply. (n=77)

	Count	Percentage of Sample Answered
Board member role dedicated to onboarding	9	11.7%
President	65	84.4%
Role predecessor	50	64.9%
Other	21	27.3%

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

- We have board member roles paired for accountability based on the roles interactions. For instance, the President's cycle (P, PE, PP) are board buddies, Technology and Marketing/Communication are board buddies.
- The VP that the role falls under. For example, VP of Professional Development would own onboarding for Director of Programs, if the predecessor isn't available.
- The VP of Operations often steps in to provide as needed tasks, particularly because there were multiple open board positions in 2023.
- The President, The Director of Finance and the Business Manager coordinate onboarding
- The president will lead the welcome and recruit another board member to serve as a mentor and guide to being on the board.
- The President provides guidelines for when onboarding training should take place and expectations for when it should be completed. It is the responsibility of the outgoing board member to meet with the incoming board member to provide transition training. Incoming board members are responsible for connecting with their role predecessor and scheduling time to complete their onboarding training.
- The most onboarding process was especially challenging because three board members resigned in mid-December without finding their own replacements. Combined with the end-of-term of another member, that left only one board member continuing. We had to scramble during the last half of December to find new board members, and we are fortunate to have a full board of enthusiastic members. For this reason, the President did all of the onboarding prior to the first board meeting in January.
- Technology admin
- Past President
- Our VP of Techops also participates in onboarding to our systems
- Our outgoing President and our Past President/webmaster (longest serving member)
- Other board members that want to assist
- New Member Onboarding is conducted primarily by the President with the occasional help of the past president as needed.
- Managing Director supports the President in this
- It's a combined effort of the outgoing VP or current VP they will report to, the President-Elect, and we've established new job duties for our Secretary to support this effort as well.

- Immediate Past President
- Immediate past president
- For 2024, We have a new role, Operations Manager, who is responsible for the onboarding of new Board members.
- Executive Council - President, Past-President, President-Elect
- Executive Committee
- Admin goes over additional general items about the board

1.2 The chapter has a succession strategy for identifying and filling board member positions. (n=78)

	Count	Percentage of Sample Answered
True	69	88.5%
False	9	11.5%

Describe the elements of your succession strategy. Select all that apply. (n=69)

	Count	Percentage of Sample Answered
Has a nominating committee responsible for selecting board members	34	49.3%
Has board member dedicated to identifying future board members	20	29.0%
Has multiple touchpoints with prospects to keep them engaged and informed	54	78.3%
Maintains an ongoing list of prospective board members detailing the fit for a specific role and the individual's skills/traits	42	60.9%
Offers opportunities to attend board meetings to educate prospective board members on board activities	51	73.9%
Other	18	26.1%

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

- We have had tremendous luck engaging members into committee positions and using that as a pipeline to electing them to a board seat.
- The VP of Operations recruited two new members to join the board formally in 2023 and 2024.
- The President is using the Succession Planning Toolkit from ATD National
- The GCATD works hard to keep the bench strength of future board members high. Each VP has committees and in some cases Directors that have really been great board member prospects. We consistently have conversations with members about the board roles and opportunities that match the members' strengths.
- The CMATD board sends out targeted Call to Action emails to help promote and recruit volunteers to board positions. Promote on Social Media particularly LinkedIn. We also brief at all Central Mash events and post in Newsletter.
- Recruit prospective board members as Directors so they can experience being a board member without all of the requirements.
- President recruits directly
- Posts available committee openings on social media and recruits board successors from their respective committees.
- Open board positions are posted to the website. In addition the volunteer positions are referenced in the newsletter and at events to keep the need fresh in everyone's mind.

- Each board member actively recruits from their pool of contacts.
- Discuss open positions at every event/meeting, we use the event surveys to get volunteer interest, announce volunteer need at conference, put it in the newsletter, ask for volunteers on LinkedIn, meet with active members to gauge interest. Partner with members who voice feedback to address concerns and ask for their help and participation as a volunteer. President Elect meets with potential candidates 1-1 to discuss their passions and strengths and help determine fit for position.
- Dedicated time in monthly board meetings starting months prior to new year (starts in July)
- Creating a new "Director of Volunteers" position to identify potential future board members and connect their strengths to open positions.
- Conducts video interviews with candidate and two current Board Members.
- Ask about volunteer interest in annual member survey and promote volunteer roles on social media.
- Announces all vacant leadership and volunteer opportunities at each monthly program.
- All board members reach out to members for committee and project opportunities and identify potential future board members. The nominating committee identifies prospects, but is not responsible for the selection of future board members.

Does your chapter review its succession plan annually? (n=68)

	Count	Percentage of Sample Answered
Yes	65	95.6%
No	3	4.4%

1.3 The chapter has a volunteer recruitment strategy in place for positions supporting the board's work. (n=78)

	Count	Percentage of Sample Answered
True	66	84.6%
False	12	15.4%

The chapter volunteer recruitment strategy includes: (n=65)

	Count	Percentage of Sample Answered
Board is structured for succession planning	40	61.5%
Dedicated webpage highlighting opportunities	42	64.6%
Position dedicated to coordinating chapter volunteers	23	35.4%
Targeted outreach to prospective volunteers	52	80.0%
Volunteer job descriptions	35	53.8%
Volunteer marketing using the website, social media, and email	49	75.4%
Volunteer open house	7	10.8%
Volunteer recruitment goal included in annual goals and strategies	23	35.4%
Other	13	20.0%

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

- When a member or attendee registers for any of the GCATD events, they are asked about volunteering. The Membership and Engagement leaders reach out to that individual to discuss opportunities and needs. The goal is that every potential volunteer is contacted within 48 hours of registration.
- We use small group discussions that model focus groups to surface interests of our members and offer them a chance to build any new initiative that they are interested in creating. We also offer them a chance to get involved in current, ongoing programs.
- We recognize volunteers at the end of the year.
- We include a call for volunteers at every chapter meeting. We emphasize the benefits of volunteering in member emails. When we have upcoming events, we tie specifics to the volunteer opportunities.
- 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 a president elect position that serves one year then takes on presidency for two years. We have past president position that is held for one year following end of their term. Each VP recruits a committee, and from there can identify a potential successor to the board.
- We ask people - we share what we do and why.
- Volunteer opportunities outlined during monthly chapter meetings in a PowerPoint presentations
- Regular New Member Onboarding meetings to determine volunteer opportunities and positions. Also provide opportunities for volunteers to indicate their desire to serve in regular surveys.
- Promoted during event introductions.
- Leadership and volunteer opportunities are communicated in our Chapter Connection newsletter, at all monthly and special program, and at new member orientation.
- Discuss open positions at every event/meeting, we use the event surveys to get volunteer interest, announce volunteer need at conference, put it in the newsletter, ask for volunteers on LinkedIn, meet with active members to gauge interest. Partner with members who voice feedback to address concerns and ask for their help and participation as a volunteer. President Elect meets with potential candidates 1-1 to discuss their passions and strengths and help determine fit for position.
- At each Chapter Board Meeting we discuss Membership and Volunteer needs, create action plans, and identify specific members to contact for Volunteer Opportunities At each Chapter Event we announce Volunteer Opportunities At each Chapter Event we recognize Volunteers for time, talent, and resources given to the Chapter On Chapter website, dedicated page highlighting volunteer opportunities

1.4 At least one board member (excluding paid administrators) attends a NAC area call. (n=79)

	Count	Percentage of Sample Answered
True	76	96.2%
False	3	3.8%

1.5 The chapter had board member(s) attend ATD Chapter Leaders Conference (ALC). (n=79)

	Count	Percentage of Sample Answered
True	58	73.4%
False	21	26.6%

1.6 The chapter has an advisory board or council that involves past presidents in chapter activities. (n=78)

	Count	Percentage of Sample Answered
True	51	65.4%
False	27	34.6%

1.7 The chapter board meets to plan for the future strategically. (n=80)

	Count	Percentage of Sample Answered
True	79	98.8%
False	1	1.3%

1.8 The chapter board submitted a best practice to the SOS program in the past year. (n=79)

	Count	Percentage of Sample Answered
True	19	24.1%
False	60	75.9%

GOVERNANCE

2.1 The chapter board maintains and updates its standard operating procedures (SOPs) annually or as needed throughout the year. (n=80)

	Count	Percentage of Sample Answered
True	74	92.5%
False	6	7.5%

Which of the following does your SOPs include? (n=70)

	Count	Percentage of Sample Answered
CARE requirements	57	81.4%
Chapter background	31	44.3%
Conflict of interest policy	29	41.4%
Election of officers	54	77.1%
Job descriptions	65	92.9%
Mission and vision	62	88.6%
Organizational chart	35	50.0%
Past presidents	35	50.0%
Policies and procedures	49	70.0%
Strategic goals	47	67.1%
Other	11	15.7%

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

- SOPs for Event Prep and Delivery; SOP for Wild Apricot Maintenance
- SOP related to delivering member events
- SOP for running our Peer Mentoring programming SOP for balancing the financial each month
- SOP also includes Chapter Financial Review, Succession Planning Strategy, and Chapter Professional Development
- Our bylaws include election of officers and conflict of interest
- Other items include: 1. Chapter Board planning calendar 2. Three-year rolling list of board members 3. Description of systems and software utilized by Board members

- In 2023 we developed a Board Handbook that that has proven to be a great resource for both new Board onboarding, as well as reference for current Board members.
- Executive Advisory Board, How to gain Sponsors, Transition away from paid accounting.
- Execution of monthly programs. New Member Orientation.
- Checklists
- Bylaw review & financial review

2.2 The chapter board reviews its bylaws annually, including a review of the bylaws as part of board member onboarding. (n=79)

	Count	Percentage of Sample Answered
True	68	86.1%
False	11	13.9%

2.3 The chapter makes board meeting minutes/summaries available to members. (n=80)

	Count	Percentage of Sample Answered
True	69	86.3%
False	11	13.8%

How are board meeting minutes/summaries made available to members? (n=68)

	Count	Percentage of Sample Answered
Emailed upon request	47	69.1%
Included in newsletter	0	0.0%
Posted on member-only website	33	48.5%
Posted publicly on website	6	8.8%
Other	5	7.4%

2.4 The board maintains a central repository or document library for archiving important chapter documents. (n=80)

	Count	Percentage of Sample Answered
True	78	97.5%
False	2	2.5%

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

	Count	Percentage of Sample Answered
Basecamp	3	3.8%
Choice Box	4	5.1%
Dropbox	7	9.0%
Google Drive	66	84.6%
SharePoint	2	2.6%
Wild Apricot	38	48.7%
Other	7	9.0%

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

- | | |
|---------------|------------|
| • FreshDesk | • Outlook |
| • Hinztime | • Slack |
| • Teamwork PM | • Airtable |

FINANCE

3.1 The chapter has approximately three to six months of operating expenses set aside. (n=79)

	Count	Percentage of Sample Answered
True	76	96.2%
False	3	3.8%

3.2 The chapter board completes a risk assessment and reviews it annually. (n=80)

	Count	Percentage of Sample Answered
True	49	61.3%
False	31	38.8%

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=79)

	Count	Percentage of Sample Answered
True	68	86.1%
False	11	13.9%

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

	Count	Percentage of Sample Answered
0	5	7.8%
1	14	21.9%
2	20	31.3%
3	8	12.5%
4	4	6.3%
5	5	7.8%
6+	8	12.5%

Mean = 2.72 chapter leaders

3.4 The chapter's partnership strategy identifies, recruits, and maintains partnerships to support chapter programming and operations. (n=79)

	Count	Percentage of Sample Answered
True	67	84.8%
False	12	15.2%

If "True," please select the type of partner(s) the chapter works with. (n=66)

	Count	Percentage of Sample Answered
Other ATD chapter(s)	45	68.2%
Higher education	36	54.5%
Content provider/LMS	20	30.3%
Other professional association(s)	38	57.6%
Business(s) or nonprofits(s)	50	75.8%
Other	7	10.6%

3.5 The chapter has sponsors to support chapter programming and operations. (n=79)

	Count	Percentage of Sample Answered
True	59	74.7%
False	20	25.3%

If "True," please select the type of sponsor(s) the chapter works with. (n=59)

	Count	Percentage of Sample Answered
Local business(s)	50	84.7%
Higher education	23	39.0%
Learning/consulting agency	33	55.9%
Content provider/LMS	19	32.2%
Other	7	11.9%

MEMBERSHIP

4.1 The chapter has a member/volunteer recognition or spotlight program. (n=79)

	Count	Percentage of Sample Answered
True	62	78.5%
False	17	21.5%

How does the chapter provide recognition? (n=61)

	Count	Percentage of Sample Answered
Hosts an appreciation event	23	37.7%
Provides an award or gift	31	50.8%
Recognizes at in-person event	37	60.7%
Recognize in chapter newsletter	24	39.3%
Spotlights on the chapter website and/or social media	41	67.2%
Other	13	21.3%

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

- The chapter President sends an email to the volunteer congratulating their achievement. The emails calls out their volunteer activity in the chapter as well as who nominated them.
- The ATD chapter recognizes the accomplishments of its members on the chapter website and on its social media pages. While we don't have a set schedule, we try to spotlight a member at least every other month, and in some cases every month. This is a great way for everyone to learn about members in the chapter. Some of the questions that we ask include: 1) Where do you work 2) What is your role at work 3) How many years have you been in L&D 4) How long have you been a member of ATD Pittsburgh? 5) Any tips and advice for new members? 6) What do you love most about being in the Talent Development field? 7) Fun facts that the average person might not know about you. 8) What excites you right now in the Talent Development field 9) How has your career benefitted from being a member of ATD Pittsburgh?
- Spotlight members/volunteers at New Chapter Member Orientation
- Recognizes in powerpoint presentation at monthly meetings.
- Recognized volunteers at our board retreat. Recognized volunteers at our annual conference. Recognize volunteers at every event in our introduction PowerPoint.
- Recognize at chapter meetings and Award Dinner.

- Recognition of New and Renewal Members and Volunteers is conducted at the beginning of Chapter Events (In-person and Remote)
- President Blog Post – Dec 2023 dedicated to this topic
- Our volunteers (who are not Board members) are invited to attend the December Winter Social for free as a thank you.
- Inclusion in Board Roster as "Chapter Champions"
- Chapter electronic newsletter
- Blog highlight
- At our mixers, we recognize our chapter volunteers and cheer their accomplishments.

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=79)

	Count	Percentage of Sample Answered
True	65	82.3%
False	14	17.7%

What service does your chapter offer? (n=65)

	Count	Percentage of Sample Answered
Consultant referral services	16	24.6%
Job board	62	95.4%
Resume review workshop	8	12.3%
Other	9	13.8%

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

- We get job postings from both our members as well as other talent development constituents in the Pittsburgh region.
- Vendor directory
- Met with student inquiries to discuss and review their resume and experience as well as discuss opportunities for development.
- Mentorship
- LinkedIn profile reviews
- LinkedIn Presence workshops for people in Career Transition
- Job seeker rate and job seeker SIG
- Has a "need a job, share a job" section at all chapter meetings
- Announcements and open forum for job opportunities at all events

4.3 The chapter hosts an orientation for new members. (n=79)

	Count	Percentage of Sample Answered
True	53	67.1%
False	26	32.9%

How is the new member onboarding delivered? (n=52)

	Count	Percentage of Sample Answered
In-person	10	19.2%
Virtual	46	88.5%
Hybrid	6	11.5%

What is the program frequency? (n=52)

	Count	Percentage of Sample Answered
Annually	3	5.8%
Monthly	7	13.5%
Quarterly	14	26.9%
Twice a year	2	3.8%
On-demand	20	38.5%
Other	6	11.5%

If "other," please explain:

- Sent upon joining.
- It was offered 3 times in 2023
- Every other month, beginning in January.
- Every other month
- Every chapter meeting - typically every other month / twice a quarter
- Began as monthly and transitioned to bi-monthly

What content is included in the onboarding? (n=52)

	Count	Percentage of Sample Answered
ATD overview	51	98.1%
Chapter background	45	86.5%
Member benefits	51	98.1%
Overview of events	49	94.2%
Power Membership	49	94.2%
Volunteer opportunities	51	98.1%
Other	11	21.2%

If "other," please describe additional onboarding content:

- Upcoming events Ask how member learned about ATD Smoky Mountain Chapter Discussion of ATD Capability Model and areas of interest/need
- Types of Communication Chapter sends, How to use the website to find what you need, how to use the website to network.
- New members are provided with a new member journey document to provide guidance on getting started and also getting the most out of their membership.
- Networking, Member Directory
- Member Spotlight, Sponsors and Resources
- Live member testimonial from a seasoned chapter member
- Learn Amp demo, networking
- Degreed membership, Wild Apricot for member app
- Chapter Leadership team
- Board Member Introductions and Bios
- Asking about why they joined and how we can best support them. Connecting them to other members or board members as appropriate.

4.4 The chapter tracks the retention rate of its members and determines a target retention rate to meet annually. (n=79)

	Count	Percentage of Sample Answered
True	44	55.7%
False	35	44.3%

4.4 The chapter makes its membership available on the ATD Store. (n=81)

	Count	Percentage of Sample Answered
True	76	93.8%
False	5	6.2%

4.5 The chapter creates awareness about volunteering for the chapter and open positions. (n=79)

	Count	Percentage of Sample Answered
True	79	100.0%
False	0	0.0%

Volunteer recruitment resources include: (n=77)

	Count	Percentage of Sample Answered
Announcements at chapter events	72	93.5%
Dedicated webpage with open volunteer positions	36	46.8%
Volunteer fair/event	3	3.9%
Volunteer job descriptions	43	55.8%
Volunteer marketing through social media and email	61	79.2%
Webinar	7	9.1%
Other	14	18.2%

4.6 The chapter achieves a joint chapter/ATD membership rate of 45 percent or higher while meeting the 20 joint member minimum. (n=78)

	Count	Percentage of Sample Answered
True	62	79.5%
False	16	20.5%

4.7 The chapter identifies those activities most impacting its joint membership rate. (n=79)

	Count	Percentage of Sample Answered
True	47	59.5%
False	32	40.5%

4.8 The chapter holds a membership campaign to recruit prospective members. (n=78)

	Count	Percentage of Sample Answered
True	59	75.6%
False	19	24.4%

PROGRAMMING

5.1 The chapter offers a mentoring program/initiative for its members. (n=79)

	Count	Percentage of Sample Answered
True	15	19.0%
False	64	81.0%

How long is your program?

- 1 year
- 3 months
- 5 months
- 6 months
- 6-12 months
- 8 weeks
- 9 months
- As needed
- Indefinite
- Length varies

How many mentees did you have? (n=15)

	Count	Percentage of Sample Answered
0	1	6.7%
1-4	1	6.7%
5-9	6	40.0%
10-14	4	26.7%
15-19	0	0
20 or more	3	20.0%
Mean = 11.5 Mentees		

How many mentors did you have? (n=15)

	Count	Percentage of Sample Answered
1-4	4	26.7%
5-9	6	40.0%
10-14	5	33.3%
Mean = 6.6 Mentors		

5.2 The chapter uses the Talent Development Capability Model™ in program development. (n=80)

	Count	Percentage of Sample Answered
True	74	92.5%
False	6	7.5%

5.3 The chapter hosts MORE THAN six professional development events each year. (n=80)

	Count	Percentage of Sample Answered
True	75	93.8%
False	5	6.2%

How many networking events did the chapter hold in 2023? (n=72)

	Count	Percentage of Sample Answered
0	4	5.6%
1–4	42	58.3%
5–9	12	16.7%
10–14	11	15.3%
15–19	1	1.4%
20 or more	2	2.8%
Mean = 5.5 networking events		

How many special interest groups (SIG) events did the chapter hold in 2023? (n=69)

	Count	Percentage of Sample Answered
0	21	30.4%
1–4	13	18.8%
5–9	13	18.8%
10–14	6	8.7%
15–19	5	7.2%
20–24	9	13.0%
25 or more	2	2.9%
Mean = 7.8 SIG events		

How many geographic interest groups (GIG) events did the chapter hold in 2023? (n=62)

	Count	Percentage of Sample Answered
0	52	83.9%
1–4	8	12.9%
5–9	1	1.6%
10–14	1	1.6%
Mean = 0.8 GIG events		

How many webinar events did the chapter hold in 2023? (n=70)

	Count	Percentage of Sample Answered
0	5	7.1%
1–4	16	22.9%
5–9	23	32.9%
10–14	10	14.3%
15–19	6	8.6%
20–24	3	4.3%
25 or more	7	10.0%
Mean = 10.2 Webinars		

5.4 The chapter partnered with other chapters to host a conference for its members and prospects. (n=80)

	Count	Percentage of Sample Answered
True	32	40.0%
False	48	60.0%

What was your conference theme?

- Turn the KEY and open the door to Knowledge, Empowerment, and YOU

at the CRATD/CRHRA Annual Conference

- The New Frontier: Charting the Future of L&D
- Technology
- Subway to Success-Navigating the Future of Talent Development Micro Conference
- Southwest Learning Conference
- Solutions That Inspire
- Professional Development Day
- People. Performance. Promoting Belonging.
- No specific theme
- New England Area Conference
- New England Area Chapters
- Moving Forward Together: Resilience to Engagement
- Michigan Virtual ATD2023 Conference - like a mini ICE
- LearntoberFest
- Learning...Everywhere, Everything All At once
- I am ATD St. Louis!
- Future Prep Your Training: Using Tomorrow's Technology Today
- Expanding Possibilities: Future of Talent Development
- Evolve. Elevate. Engage.
- Engagement
- Driving Transformation – Empowering change to unlock success
- Driving Transformation
- DEI
- Cultivate
- Creating Learning Champions
- Consult Your Way to Success in Talent Development
- Connection [The Power of Connection in Learning with ATDVOS]
- ATD New England Area Conference
- April 2023: Leading Effective Change and Driving Execution & Accountability. Fall 2023: Leveraging Measurement For Better Decisions
- A Whole New World: Explore the Possibilities Learning Conference
- 80 Years of Empowering Growth: Celebrating Our Past, Transforming Our Future

How many people attended the conference? (n=29)

	Count	Percentage of Sample Answered
1–49	7	24.1%
50–99	7	24.1%
100–149	11	37.9%
150–199	1	3.4%
200 or more	3	10.3%
Mean = 105 people		

5.5 The chapter offers its study groups for the Associate Professional in Talent Development (APTD[®]) and/or Certified Professional in Talent Development (CPTD[®]). (n=80)

	Count	Percentage of Sample Answered
True	29	36.3%
False	51	63.7%

What type of study group does the chapter offer? (n=29)

	Count	Percentage of Sample Answered
APTD	11	37.9%
CPTD	27	93.1%

On average, how many APTD study groups did your chapter run in 2023? (n=11)

	Count	Percentage of Sample Answered
1	8	72.7%
2	2	18.2%
20	1	9.1%
Mean = 2.9 study groups		

What is the average number of participants per APTD study group? (n=11)

	Count	Percentage of Sample Answered
0	1	9.1%
1-4	6	54.5%
5-9	3	27.3%
10 or more	1	9.1%
Mean = 6.2 participants		

On average, how many CPTD study groups did your chapter run in 2023? (n=27)

	Count	Percentage of Sample Answered
0	1	3.7%
1	13	48.1%
2	12	44.4%
24	1	3.7%
Mean = 2.3 study groups		

What is the average number of participants per CPTD study group? (n=7)

	Count	Percentage of Sample Answered
0	2	7.4%
1-4	10	37.0%
5-9	7	25.9%
10 or more	8	29.6%
Mean = 8.26 participants		

5.6 The chapter hosts its own awards program (n=80)

	Count	Percentage of Sample Answered
True	16	20.0%
False	64	80.0%

What awards categories do you provide? (n=15)

	Count	Percentage of Sample Answered
Company	8	53.3%
Consulting	5	33.3%
Individual	13	86.7%
Professional Achievement	8	53.3%
Nonprofits	4	26.7%
Work teams	3	20.0%
Other	7	46.7%

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

- The categories were: Learning Innovators, Chief Influencers, The People's Choice, Superlatives Award, ATD's Got Talent, Best In Class, Best Noteworthy Performance
- Instructional Design Trailblazer of the Year
- Exceptional Contribution; Lifetime Achievement;
- Coaching and Mentoring, Individual (4 categories), Integrated Talent Management, Learning and Development, Learning Technologies, Performance Improvement
- Chapter Service Awards
- Categories aligned with Talent Capability Model domains.

5.7 The chapter collaborates with other chapters to plan and host joint programming. (n=79)

	Count	Percentage of Sample Answered
True	34	43.0%
False	45	57.0%

COMMUNICATION

6.1 The chapter communicates with its membership about non-programming information. (n=79)

	Count	Percentage of Sample Answered
True	69	87.3%
False	10	12.7%

What does the chapter use? (n=69)

	Count	Percentage of Sample Answered
Blog	11	15.9%
Email	62	89.9%
Facebook	42	60.9%
Instagram	22	31.9%
LinkedIn group	61	88.4%
Newsletter	46	66.7%
Twitter	12	17.4%
YouTube	12	17.4%
Video Blog	3	4.3%
TikTok	1	1.4%
Slack	11	15.9%
Other	15	21.7%

What “other” communication tools does the chapter use?

- WhatsApp for committees such as Influencers and Champions of Learning
- Website
- Networking events.
- Podcast
- Video
- Members Only Page
- LinkedIn
- Face-to-face

6.2 The chapter has a targeted communication strategy and plan (including social media) to communicate with chapter prospects and members. (n=78)

	Count	Percentage of Sample Answered
True	76	97.4%
False	2	2.6%

6.3 The chapter provides a member-only section through the chapter’s website or social media. (n=79)

	Count	Percentage of Sample Answered
True	73	92.4%
False	6	7.6%

Select the information provided behind the member gateway or social media channels used. (n=72)

	Count	Percentage of Sample Answered
Board meeting minutes	39	54.2%
Event materials	51	70.8%
Governance documents	37	51.4%
Job board	41	56.9%
Member directory	60	83.3%
Mentoring	7	9.7%
Other	16	22.2%

6.4 The chapter participates in and promotes Employee Learning Week. (n=78)

	Count	Percentage of Sample Answered
True	51	65.4%
False	27	34.6%

What did your chapter do to support Employee Learning Week (ELW)? (n=51)

	Count	Percentage of Sample Answered
Hosted a themed event	21	41.2%
Hosted a webinar	12	23.5%
Organized a relevant communications plan	36	70.6%
Organized an awards program	4	7.8%
Received a state proclamation	5	9.8%
Other	18	35.3%

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

- We posted about learning technologies daily on LinkedIn, we held a daily Kahoot quiz and gave away a membership to the winner.
 - We created a networking event at our 40th anniversary and holiday celebration that focused on ELW. Participants formed groups to discuss engagement strategies for in-person and online learning.
 - The Chapter highlighted principles of Adult Learning online, and invited participants to “Share Your (their) Brilliance” on how their organization puts the principles into action. Each day of ELW featured an area of Adult Learning Principles and included the link to an article (preferably via ATD) followed by an invitation to “Share Your Brilliance.” Daily ELW Focus Areas: Monday, December 4th - Involvement in Learning Adults want to be involved in the planning, delivery and execution of their learning. Tuesday, December 5th - Accessing Past Experiences Adults possess a wealth of experiences to help them understand new information. Wednesday, December 6th - Problem Solving Adults want to solve problems and apply reasoning. Thursday, December 7th - Immediacy Adults want to be able to apply information immediately. Friday, December 8th - Lessons Learned
 - Social event with networking activities & games
 - Promoted on our home page and on members only page
 - Promote ATD events online.
 - Posted materials for members to use from a variety of sponsors and guest speakers. This allowed members to build their libraries of materials to share with employees in their organizations and provided additional visibility to the sponsors and board members who participated.
 - Mentioned in newsletter
 - LinkedIn Posts; VP of Membership posted on Facebook; shared communication plan with all Chapter members so they could participate if they chose to do so
 - LinkedIn campaign
 - Hosted a weeklong micro conference that offered both virtual and in person programming.
 - ELW was promoted via website and social media. Had planned a specific event for the week however it had to be postponed.
 - During our end of the year virtual celebration in December, we promoted Employee Learning Week and asking members to post what it means to them on our chapter's LinkedIn page as a part of an activity.
 - During ELW, CNY ATD posted social media messages and hosted a Coffee Chat and CNY ATD Harnessing the Power of AI for Talent Development Program with a special BOGO Extravaganza.
 - Curated content for our website.
 - Created posts on LinkedIn to highlight learning week
 - Board member videos daily (M-F) sharing best learning from the year shared in an email with resources on the topic.
 - Asked members to submit responses to the question 'what did you learn in 2023' for a chance to win a Masterclass subscription for a year. We shared their results in the following month newsletter and selected two recipients.
-