

# ATD Chapter Leader Orientation

Welcome to the ATD chapter  
leader community!

# Welcome & Congratulations!!!

**In Chat, let us know:  
Your Name  
Your Chapter**



# Who's in the Room?

What's your current primary role/functional area as a Chapter Leader?

- A. President (Current/Elect/Past)
- B. Programming
- C. Marketing/Communications
- D. Finances/Sponsorships
- E. Membership
- F. Other

# Who's in the Room?

How long have you served in volunteer roles for ATD?

- A. Greater than 20 years
- B. 10-20 years
- C. 5-10 years
- D. 2-5 years
- E. 1-2 years
- F. Less than 1 year

# What's on Your Mind?

In Chat, let us know:

**What are you most excited about or hope for in your new chapter role?**



# What's on Your Mind?

In Chat, let us know:

**What's your greatest challenge, concern or fear taking on the new chapter role?**





***Send questions in chat  
throughout the webcast!***

# Today's Session Team



Juliet Hart

National Advisor for  
Chapters

*Home: Mid-New  
Jersey Chapter*



Candice Hunt

National Advisor for  
Chapters

*Home: Capital  
Region Chapter*



Callan Swaim,  
CPTD  
National Advisor for  
Chapters

*Home: New York City  
Chapter*

Strategic Leadership  
Committee Chair



Lisa Torreano,  
CPTD  
National Advisor for  
Chapters

*Home: Houston  
Chapter*



Shruti Nallappa

Chapter Relations  
Specialist, Eastern Area

*ATD*

# Agenda

- Your Support Team
- Board Volunteers & Chapter Basics
- Introducing CARE
- Chapter Leader Community (CLC)
- Ongoing Development Opportunities
- Questions

# Your Support Team

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# Chapter Services Team



**Bianca Clark**

Senior Manager,  
Chapter Services  
[bclark@td.org](mailto:bclark@td.org)



**Jocalyn Lombardi**

Project Manager,  
Chapter Services  
[jlombardi@td.org](mailto:jlombardi@td.org)



**Shruti Nallappa**

Chapter Relations  
Specialist, Eastern Area  
[Snallappa@td.org](mailto:Snallappa@td.org)

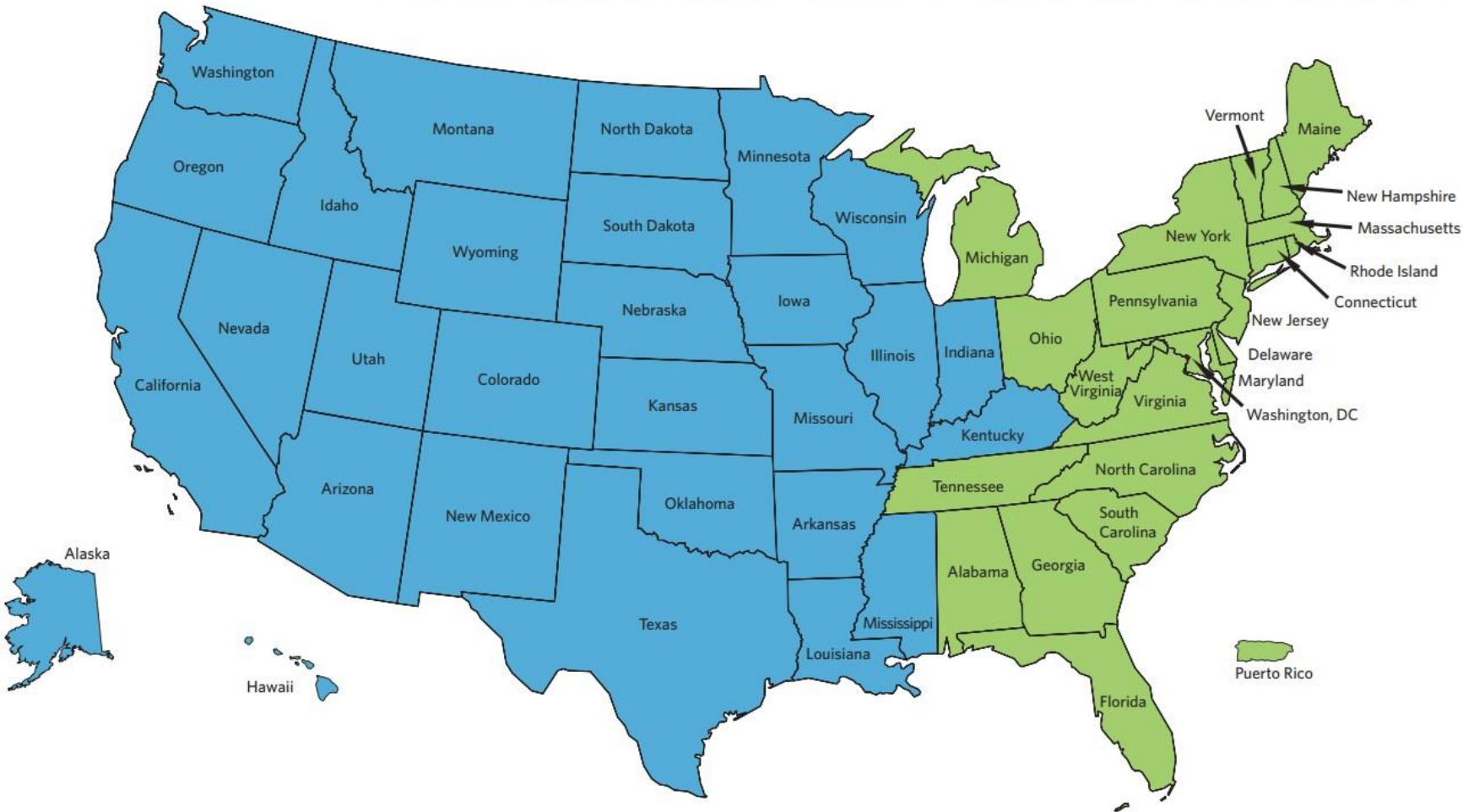


Open  
Position

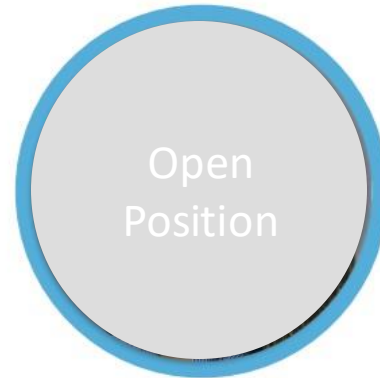
**Open**

Chapter Relations  
Specialist, Western Area

# ATD CONTACTS FOR CHAPTER LEADERS



**SHRUTI NALLAPPA**  
Chapter Relations  
Specialist, Eastern Area  
snallappa@td.org



Chapter Relations Specialist,  
Western Area



Have a question? Want more information? Contact your ATD Chapter Relations Specialist.

# National Advisors for Chapters (NAC)



NAC can support your chapter in many ways...

- Chapter Affiliation Requirements (CARE)
- Annual board retreat support
- Resources from ATD national
- Coach chapters about ATD initiatives
- Share best practices
- Define future roles for chapters
  
- Advise ATD staff about issues of importance to chapters
- Advocate for chapters & ensure needs of chapters are recognized by ATD



# Meet Adam White

*NAC Chair and Member  
of the ATD Board of  
Directors*

January 2025 – December 2026

# ATD Community!

Online space for ATD members to:

- connect with TD professionals
- exchange ideas
- ask questions
- get support for real-world challenges
- explore industry resources
- and celebrate each other's successes

The screenshot displays the ATD Community website interface. At the top, there is a navigation bar with links for Home, Get Started, Connect, Events, and Learn & Grow. A search bar and a 'Create' button are also visible. The main content area is divided into several sections:

- User Profile:** Sarah Schillen, Director of Learning & Organizational Development, with a CPTD badge and a 70% profile completeness score.
- Discussion Thread 1:** 'TalentLMS, Anyone?' by Jason Yerep, discussing LMS laundry lists.
- Discussion Thread 2:** 'Tips for Fostering Happiness at Work' by Chloe Sferra, discussing a podcast with Juliana Sawaia.
- My Groups Quick List:** A list of communities including General Community Chat (30973 members), Consultant's Corner (61 members), and The Marketplace (30972 members).
- Quick Links:** A sidebar with links to Update My Profile, Member Benefits Center, View Our Upcoming Courses, Find Your Local Chapter, Get Certified, Connect With a Professional Development Specialist, and Contact our Customer Care Team.
- Share Your Voice:** A call to action to provide insights on coaching by taking a survey.
- Upcoming Events:** A section for upcoming events.

# Board Volunteers & Chapter Basics

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# What is a Chapter?

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- A. A non-profit organization
- B. An entity to run like a business
- C. A group of really amazing talent development professionals
- D. An opportunity to go rogue

# What is a Chapter?

An ATD chapter is a local, independent organization that is affiliated with ATD National.

Independence

- Chapters have their own governing boards and local operations

Affiliation

- They are part of the ATD network, benefiting from its resources and brand

Standards

- Chapters must adhere to ATD's guidelines to maintain quality and consistency

Support

- ATD National provides resources and support to help chapters succeed

# What helps you run a Chapter?

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- A. Chapter bylaws
- B. Local, state, and federal laws
- C. Incorporation requirements
- D. Chapter procedures
- E. ATD national affiliation

# Board Service - What does it mean?

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Serving on a Board means you agree to which of the following?

- A. Duty of Care
- B. Duty of Loyalty
- C. Call of Duty
- D. Duty of Obedience

# You're a Board Member! Now What?



## Duty of Care

- Be informed about the organization and make decisions based on research and sound judgment



## Duty of Loyalty

- Be committed to ensuring the organization's success and prioritize the organization's best interests over your own personal interests



## Duty of Obedience

- Follow the organization's rules, bylaws, and legal requirements

# Introducing CARE

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Chapter Affiliation Requirements

# CARE is...



*“A set of performance guidelines to help chapters deliver consistent benefits to members.”*



*Your **guiding light** to running your chapter as a **business***

# CARE Areas



Board of Directors



Communication



Finance



Governance



Membership



Programming

# CARE vs. CARE Plus

**atd CARE**   
Chapter Affiliation  
Requirements

**atd CARE+**   
Chapter Affiliation  
Requirements

CARE Plus is a collection of strategies with a purpose to provide:

- chapter leaders with recognition opportunities
- a personalized road map to help identify gaps and strengthen chapter operations
- flexibility for self-paced growth
- formalized processes to address common chapter challenges
- a growth mindset

# CARE vs. CARE PLUS

## CATEGORY

## FOUNDATIONAL REQUIREMENTS

## CARE PLUS

Programming

**5.1 Chapter Programs:** Chapter provides at least six professional development activities per year for members.

### SELECT 3

- + **Mentoring Program:** Chapter offers a mentoring program/initiative for its members.
- + **ATD Capability Model:** Chapter uses the ATD Capability Model in program development.
- + **Expanded Programming:** Chapter hosts more than six professional development events each year.
- + **Chapter or Regional Conference:** Chapter hosts or partners with other local chapters to host a conference for its members and prospects.
- + **Certification Opportunities:** Chapter offers its own study groups for the Associate Professional in Talent Development (APTD) and Certified Professional in Talent Development (CPTD).
- + **Awards Programming:** Chapter hosts its own awards program.
- + **Joint Programming:** Chapter collaborates with other chapters to plan and host joint programming.

## CARE Resources

[Expand All](#)

2024 CARE Submission Summary (Reporting on the 2023 calendar year) +

CARE Workbook +

CARE Foundational and Plus Planning Tool +

CARE Foundational Requirements and CARE Plus Elements Quick List +

CARE Foundational Element Matrix +

CARE Plus Element Matrix +

Monthly CARE Tracker - Game of CARE +

Joint Membership Job Aid +

CARE 2023 Information and Planning Session +

Risk Assessment Guide +

Annual Report Template +

# CARE Resources

## Addendum Document Resources

[Expand All](#)

CARE Membership Roster Template +

CARE Board Roster Template +

Chapter Operating Plan +

Most Recent Yearly Balance Sheet and Income Statement +

**atd CARE**   
Chapter Affiliation  
Requirements  
Chapter Affiliation Requirements  
(CARE)  
Workbook

<https://td.org/care>



## NAC Favorites



- Candice Hunt

*"The **CARE Workbook** helps provide direction and guidance in planning and executing your strategy or annual activities. It serves as a tool to ensure the chapter has all aspects of CARE covered and also supports prioritizing work to use board resources effectively and serve chapter needs."*

# Chapter Leader Community (CLC)

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<https://www.td.org/chapters/clc>

# Chapter Leader Community (CLC)

Learn | Share | Succeed

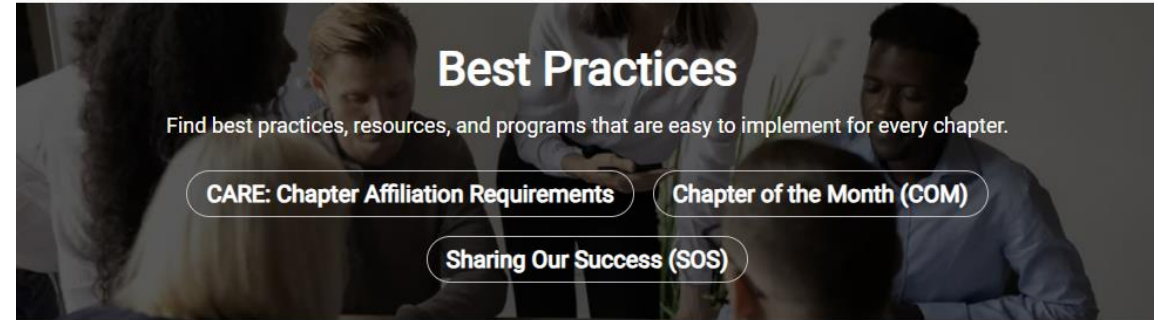
Find a topic quickly with the [short links map](#) or use the navigational sections below.  
Questions, view the [chapter leader FAQs](#).

## Updated Chapter Logos, Templates, and Branding Guide Available Now

During ATD's Annual Membership meeting, Tony Bingham announced that **ATD is changing its logo colors—to blue and green**. Updated materials are now available to chapters, including updated logos, templates, and a new branding guide. **Chapters have one year, until May 15, 2025 to transition to the new brand.**

[Download the updated branding materials here.](#)

[td.org/clc](https://td.org/clc)



[Administration](#) [Finance](#) [Membership](#) [Board Development](#) [Communications & Marketing](#) >

Learn how your chapter can succeed, inspire, and grow through strong chapter administration and leadership. Access essential chapter and board development tools to take your chapter to the next level.

- **[ATD Education/Chapter Partnership Program](#)**

Promote upcoming certificate programs and earn CHIP revenue. Chapters may also be eligible to receive a complimentary registration to local programs.

- **[Wild Apricot Partnership](#)**

A partnership with Wild Apricot is available to provide membership, website, and event management services to chapters at a discounted rate.

- **[Toolkits](#)**

Toolkits should be disseminated to chapter leaders responsible for that functional area throughout the year and when new information becomes available.

# A Great Start: Onboarding Checklist

## Additional Board Development Resources

TOPIC	DESCRIPTION
<a href="#">First 90 Days Chapter Leader Guide</a>	This guide is intended to support your leadership journey to ensure chapter success.
Business Acumen Development	This skill assessment is an opportunity for your chapter board to individually assess and get feedback on the specific abilities, knowledge, and behaviors that exemplify business acumen. In addition to being an assessment, this provides a positive model of what your chapter should look for in a potential chapter leaders.
<a href="#">Chapter Finance Toolkit</a>	Designed as a resource for a chapter finance officer, provides important information and advice on typical CFO responsibilities.
<a href="#">990 Filing Information</a>	The guide provides information on filing a 990 or 990-N for the chapter.
<a href="#">Chapter Leader Onboarding Checklist</a>	Review the Chapter Leader Onboarding Checklist to learn about the resources that will support your success as a new chapter leader.

## Chapter Leader Community (CLC)

*Learn | Share | Succeed*



## CHAPTER LEADER ONBOARDING CHECKLIST

<b>Get to Know Your National Advisor for Chapters (NAC)</b> <a href="http://td.org/nac">td.org/nac</a>	Members of the NAC are distinguished chapter past presidents who serve as national volunteer advisors. Contact your chapter's NAC to share best practices and connect with leaders in your area on regularly scheduled calls.
<b>Get to Know Your Chapter Relations Specialist (CRS)</b> <a href="http://td.org/crs">td.org/crs</a>	ATD's chapter services team is here to assist chapters and support their needs. Each chapter has a CRS who can answer your questions and share administrative, membership, and marketing guidance.
<b>Watch the Chapter Leader Onboarding and Orientation Webcast</b> <a href="http://td.org/chapterwebinararchive">td.org/chapterwebinararchive</a>	Watch the onboarding webcast to learn what every chapter leader needs to know to get started. Members of the NAC and chapter services review helpful tools and resources in the Chapter Leader Community. Find the webinar in the Chapter Webinar Archive.
<b>Visit the Chapter Leader Community (CLC)</b> <a href="http://td.org/clc">td.org/clc</a>	Visit the Chapter Leader Community (CLC) to access tools and resources for effectively running your chapter.
<b>Browse the Sharing Our Success (SOS) page</b>	Visit the Sharing Our Success (SOS) page to learn about best practices from other chapters.

<https://www.td.org/chapters/clc/board-development>

# 90 DAY Resource!

## ★ NAC Favorites

*"I'm excited to have access to the 'First 90 Days Chapter Leader Guide'. I'm confident that it will be an invaluable tool for new leaders, providing the guidance and support needed to hit the ground running and make a significant impact on their chapters."*



-Amber Watts

### Additional Board Development Resources

TOPIC	DESCRIPTION
<a href="#">First 90 Days Chapter Leader Guide</a>	This guide is intended to support your leadership journey to ensure chapter success.

Are you new to running a chapter?  
This resource is for you! We have created a checklist to help you get organized and stay on track.

# ATD Chapters Diversity, Equity, and Inclusion

## Embedding Diversity, Equity & Inclusion into Chapter Operations

Learn how chapters can use DEI as a lens to view chapter operations and think about why DEI should be a priority for chapters.

Diversity, Equity, & Inclusion Resources

## ATD Chapters Diversity, Equity, and Inclusion

### Diversity, Equity, and Inclusion (DEI) Resources

We want chapters to use DEI as a lens to view chapter operations. Think about why DEI should be a priority for your chapter. Our chapters represent a diverse group of talent development professionals with different perspectives and needs. When we address these in our chapter operations to give everyone a voice, we are able to make a positive impact that helps create a world that works better. Get on the same page with terms of the matter and how they are defined.

Chapter Board DEI Infographic

Chapter Leader DEI Assessment

DEI Toolkit for ATD Chapter Leaders

<https://www.td.org/chapters/clc/diversity-equity-and-inclusion>

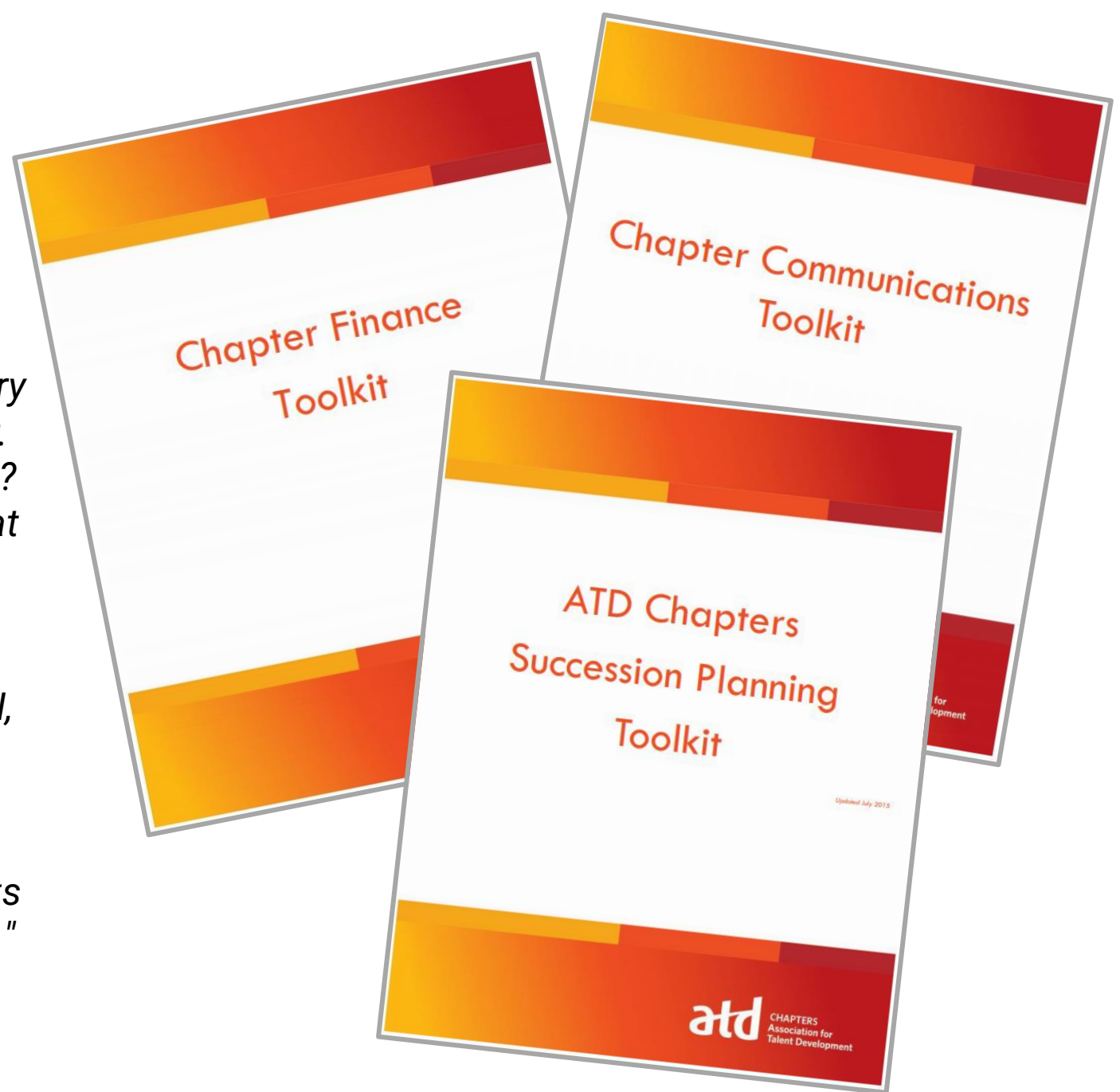
# ★ NAC Favorites



-Lisa Torreano,  
PhD, CPTD

*"No one's an expert in every area of running a chapter. Don't know where to start? ... **ATD Toolkits** are a great way to jumpstart your initiative.*

*Whether your focus is DEI, onboarding new board members, forming partnerships or more - Check out the ATD Toolkits to accelerate your efforts."*



# ★ NAC Favorites

*“My ultimate ATD fav tools arrives in our inbox every month, and can also be found on the CLC website, the **Leader Connection Newsletter (LCN)**.*



*-Callan Swaim, CPTD*

*This is a one-stop shop for all pertinent current events and deliverables for chapters.”*

<https://www.td.org/chapters/clc/lcn>

## atd Chapter Leader Connection Newsletter *Supporting Chapter Success*

### October ATD Updates

#### Join the NAC's Orientation Webinar Series: Oct 24-Nov 6!

New in 2024, NAC and Chapter Services are hosting an Onboarding and Orientation week! A general orientation webinar will cover the foundational elements of chapter leadership, while role-specific sessions offer tailored insights and resources. All sessions are open to current, incoming, and potential future board members. [Learn more and register here.](#)

#### Apply to Join the Chapter Recognition Committee (CRC) by November 1!

Are you interested in volunteering at the national level, learning about best practices in chapter operations, and celebrating chapters from across the country? [Apply to join the Chapter Recognition Committee \(CRC\)](#)! The CRC is an excellent opportunity for chapter leaders to continue their leadership journey. Applications are due **November 1**. Learn more below.

#### CARE Survey Platform Launch

CARE is right around the corner! CARE contacts will receive a unique link to access their chapter's CARE survey this month. The chapter president will receive the submission link by default for chapters that did not submit a CARE contact. Submissions are due by **January 31, 2025** (January 17 for early birds!). Continue reading below for additional resources.

#### Submit a Proposal to Present at ALC 2025

The ALC RFP submission form will go live on **October 17**. Chapter leaders interested in presenting at ALC should **submit a proposal by December 6** for consideration. For more information on the submission process, [register to attend the informational webinar on October 17 at 2 p.m. ET](#). Continue reading below for additional information.

# ★ NAC Favorites

## Sharing Our Success (SOS): Resources created by chapters for chapters

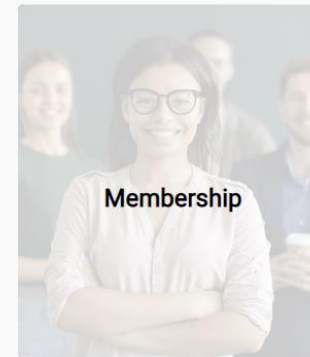
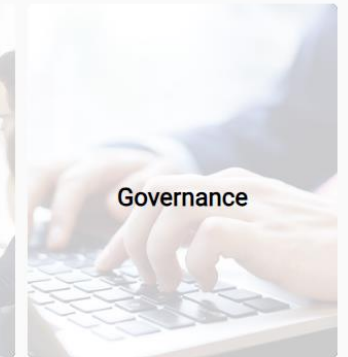
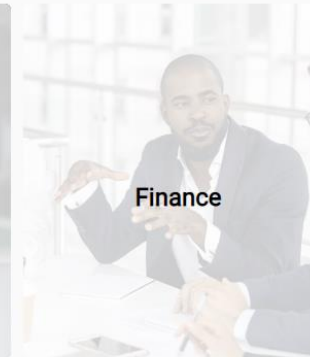
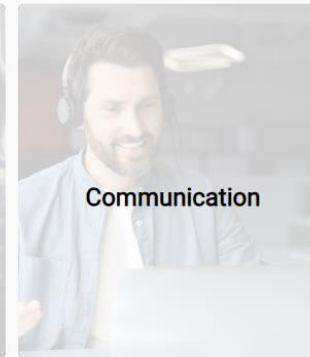
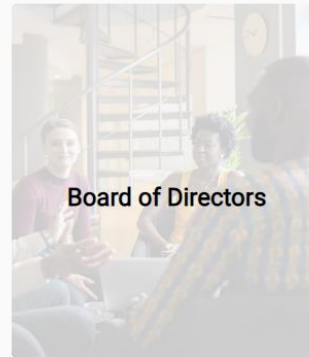


-Juliet Hart

*“The **SOS repository** is a wealth of knowledge where chapters share their best practices for success in areas from governance to programming to finance to communication.*

*Going through past SOS-es can help chapters solve a current problem or jumpstart an idea for a new initiative. I recommend that any chapter leader go through previous SOS-es relevant to their role as part of their onboarding process.”*

### Browse Success Stories by Category

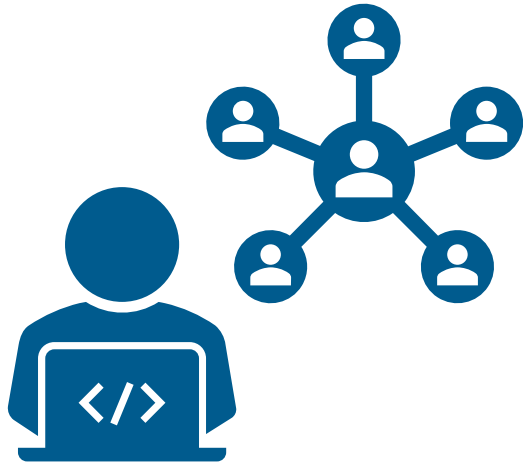


# Growing as a Chapter Leader

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# Development Options

Virtual calls &  
webcasts



Committees &  
resource sharing



In-person  
events



# Chapter Leader Area Calls:

## Learning Labs & Leader Connects

Hosted by NAC for the chapters they serve to help chapter leaders:

- Stay connected
- Build community
- Share best practices
- Solve critical challenges
- Learn from one another
- Expand your network
- Receive pertinent updates from Chapter Services



# ★ NAC Favorites



-Adam White, CPTD  
NAC Chair

*"I am a huge fan of the **chapter leader calls**. I know that I've walked away from each call with at least one item to discuss with my fellow chapter leaders to better serve our members. We have some great ideas to share and support our fellow chapters."*

Chapter Leader Calls

*Watch for invites and emails from your NAC*

[td.org/nac](https://td.org/nac)

# ATD Chapter Leaders Conference (ALC)

ALC brings together chapter leaders from across the country. Current and incoming board members network and share best practices for running an ATD chapter.

**ALC** 2026

**atd** CHAPTER  
LEADERS  
CONFERENCE

LOS ANGELES  
MAY 15–16

## Join Us in Los Angeles!

Connect with ATD's volunteer chapter leaders from over 70 chapters nationwide! Share best practices, network with peers, and celebrate the impact of your chapter leadership.

**Registration OPEN!**

## New Optional Offering

Join us on **Friday, May 15** (Before the Welcome Networking Reception) for **[The BOX Experience: Building Better Boxes for Chapters and Leaders.](#)**



<https://www.td.org/chapters/clc/alc>

Hi, Sarah. Welcome back!

# National Membership Benefits

[Dashboard](#)

[My Activity](#)

[Benefits Center](#)



[Edit](#)

**Sarah Schillen**

[Talent Development](#)  
[Director/Executive in Management consulting services](#)

CPTD  
RECERTIFY BY: 06/29/2027

[My Account](#) →

**My Topics**

[Edit](#)

FOLLOWING 13 TOPICS

Career and Leadership Development

Change Management

Coaching

Consulting and Business Partnering

**My Learning**

Needs Assessment Certificate

June 20, 2024

COURSE

ATD 2024 International Confer...

May 19, 2024

CONFERENCE

2024 ATD Chapter Leaders Conference

May 17, 2024

CONFERENCE

[My Activity](#) →

**My Membership**

**Professional Plus**

EFFECTIVE: 03/22/2015 - 03/30/2025

Take advantage of all the member-only tools and resources to make the most of your membership.

[Visit the Benefits Center](#) →

**TD Capability Model**

**Self-Assessment**

- ✓ Building Personal Capability
- ✓ Developing Professional Capability
- ✓ Impacting Organizational Capability

Reassess



**My Learning Path**

Certified Professional in Talent Development

**My Learning Plan**

You have not created a learning plan.

Get Started



[View Capability Model](#) →

<https://my.td.org/myatd/dashboard>

# Recertification Points



**atd** CERTIFICATION INSTITUTE  
Association for Talent Development

ATD Online Credential Management System

Candidate ID: 10947681

Certified Professional in Talent Development™ (CPTD)  
Credential #:

PROFESSIONAL DEVELOPMENT POINTS PROGRESS

60 completed

You may begin posting recertification activities as soon as you earn the CPTD. **You will be able to submit your completed application beginning 90 days before the expiration date.**

**Requirements**

- ✓ Professional Development
- New Capabilities Continuing Education →

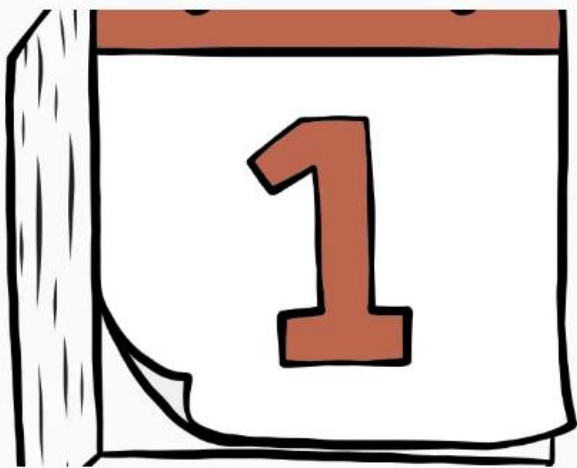
Recertification requires a total of 60 credits, distributed across several categories. **At least 20 points MUST be in the Continuing Education Category.** You will receive a maximum credit for each category as follows:

Category	Max Points/Cycle
Continuing Education	60
Leadership and Recognition	20
On-the-Job Experience	20
Research and Publishing	20
Speaking and Instructing	20
Professional Membership	15

Category	Examples	Points Per Year
Talent Development Officer, National	ATD Board Member ATD CI Board Member ATD Program Advisory Committee (PAC) National Advisors for Chapters (NAC) Board Member, National Organization	10
Talent Development Officer, Local	ATD Chapter President ATD Chapter Director of Certification ATD Chapter Director of Membership ATD Chapter Treasurer	7
Talent Development Committee Member - National	Editorial Board for talent development-related magazine	5
Talent Development Committee Member - Local	ATD Chapter Program Committee	5
Talent Development-Related Award from A National Talent Development Association	ATD CPTD Contributor Award ATD Volunteer Partnership Award	2
Talent Development-Related Award from A Local Talent Development Association	ATD Chapter Volunteer Award	1
ATD CI Activities (Public Relations support)	Certification Promotional Webcast, serving as a program ambassador	As assigned
ATD-Related Support Activities	ATD Review Team Member ATD Excellence in Practice Awards	5

# Key Dates Calendar

Q1 2026 Q2 2026 Q3 2026 Q4 2026



**Key Dates Calendar**

Chapter Services updates the [key dates calendar](#) to keep chapter leaders up to date on professional development opportunities and important deadlines.

## Q1 2026

January, February, March



Chapter Affiliation Requirements

JANUARY 16, 2026  
**Chapter Affiliation Requirements (CARE) Early Submission Deadline**

Learn more about this submission deadline at [td.org/care](https://td.org/care).



Chapter Affiliation Requirements

JANUARY 31, 2026  
**Chapter Affiliation Requirements (CARE) Final Submission Deadline**

Learn more about this submission deadline at [td.org/care](https://td.org/care).



MARCH 2026  
**ATD Member Appreciation Month**

Find more information on how ATD is celebrating Member Appreciation Month [here](#).



# Taking Action

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NAC

Chapter  
Services Team

ATD  
Community

ALC

Chapter  
Leader  
Community

CARE  
Workbook

Onboard  
Checklist

First 90 Days

DEI  
resources

Toolkits

LCN – Leader  
Connection  
Newsletter

SOS – Share  
Our Success

# Take Action

Which tool/resource do you plan to use in the next two weeks?

- A. CLC – Chapter Leader Community
- B. CARE Workbook
- C. Onboard Checklist
- D. First 90 Days
- E. DEI resources
- F. Toolkits
- G. LCN – Leader Connection Newsletter
- H. SOS – Share Our Success
- I. ATD Community
- J. ALC
- K. My friendly neighborhood NAC & ATD staff
- L. Other

# Taking Action

In Chat, let us know:  
**What's one thing you  
learned and one action  
you commit to taking?**



# Next Steps

- Review/bookmark your favorite resources at [td.org/CLC](https://td.org/CLC)
- Confirm you receive the ATD Leader Connection Newsletter (**LCN**)
- Collaborate with your chapter board to achieve **CARE**
- Reach out to your Chapter Relations Specialist (CRS) and National Advisor for Chapters (NAC) with questions
- Watch for the **Leader Connection Hour** session – **Coming Soon!**

# Feedback is a gift!

Please take 1 minute to share your feedback about this session:

[https://atdorg.formstack.com/forms/spring\\_2026\\_orientation\\_survey](https://atdorg.formstack.com/forms/spring_2026_orientation_survey)



Questions

