

# Chapter Leader Success Series

## Role-specific Onboarding

Membership/Member Services  
November 1, 2024

# Agenda

- Welcome/Agenda
- Role-Specific Resources
- Panel Introduction & Discussion
- Large Group Discussion



Jenn Buckley, M Ed, MBA, CPTD

Home Chapter: Florida Suncoast

National Advisor for Chapters (NAC)  
supporting:

Chapters: NYC, Long Island, Capital Region,  
Rochester, Central New York

[Jennb.nac@gmail.com](mailto:Jennb.nac@gmail.com)



# ROLE-BASED RESOURCES

---

Membership

MEMBERSHIP		
<p>The chapter submits a current membership roster in Excel to ATD Chapter Services with CARE submission.</p>	<p>Submitting a current membership roster helps ATD get an accurate picture of the size of the association. Having this information enhances ATD's ability to represent the entire membership (on the local, national, and international levels) to policy makers and advocate for regulations and legislation of interest to ATD members.</p>	<p><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>At the time of the chapter's CARE submission, submit the current roster of members to ATD Chapter Services only in the MS Excel chapter membership roster template available at <a href="https://td.org/CARE">td.org/CARE</a>. (Reminder: Chapters participating in the Wild Apricot (WA) partnership program do not have to upload their current chapter membership roster. Chapter Services can pull that for you if you have provided Natasha Porter, customer care specialist, with "Full Administrative Rights" access to your account (required for all chapters participating in the WA discount partnership program.)</li> <li>Use Wild Apricot or an internal chapter resource to maintain the database roster.</li> <li>Include the following membership information on your roster:               <ol style="list-style-type: none"> <li>last and first names</li> <li>job title (optional)</li> <li>company name (optional)</li> <li>address</li> <li>email address (required)</li> <li>preferred phone number</li> <li>membership expiration.</li> </ol> </li> </ul> <p>Please only use this <a href="#">Excel spreadsheet</a> also found at <a href="https://td.org/CARE">td.org/CARE</a>.</p>
<p>The chapter board assesses its members' needs and satisfaction levels at least once per year.</p>	<p>Measuring and using member needs and satisfaction data help leaders make informed decisions about programs, products, and services that will contribute to membership retention and growth. By collecting and reviewing this data annually in conjunction with the chapter's current and planned efforts, leaders can</p>	<p><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>Define the objectives. (What will you do with the collected data?)</li> <li>Identify the data you need to collect based on what you plan to use.</li> <li>Choose the most appropriate method for collecting the data (for example, electronic questionnaires like Survey Monkey, telephone interviews, program evaluations, and focus groups).</li> <li>Develop the questions for your data collection instrument.</li> <li>Collect the data.</li> <li>Analyze the data.</li> </ul>



## CARE FOUNDATIONAL ELEMENT MATRIX

# CARE Resources

	<p>evaluate effectiveness and potentially redirect efforts as necessary to meet members' changing needs.</p> <ul style="list-style-type: none"> <li>• Prepare a final report.</li> <li>• Communicate the findings to members.</li> <li>• Use the data for annual plan goals and continuous improvement of member benefits and services.</li> <li>•</li> </ul> <p><b>Where can I go for additional information?</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Annual Member Survey Template Job Aid</a></li> <li>• <a href="#">Member Survey Template</a></li> <li>• <a href="#">ATD Sharing Our Success (SOS) Program</a></li> </ul> <p><b>Samples from other chapters:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Midland's Member Survey</a></li> <li>• <a href="#">Piedmont's Member Survey</a></li> <li>• <a href="#">Mid-New Jersey Member Survey</a></li> </ul>
<p>The chapter achieves by 12/31/22 a minimum of 20 joint chapter/ATD members (the original chapter chartering requirement) <b>and</b> 35 percent of the chapter's membership.</p> <p>A 50 percent membership goal will be measured in the aggregate among all chapters.</p>	<p>Having a substantial joint chapter/ATD membership promotes the growth and health of the talent development (TD) 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>Joint members tend to be the leaders in the TD occupation. These professionals recognize the benefit of having access to both local and international resources. As a result, they are more informed in their local and international industries. They bring their expanded knowledge to</p> <p><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>• Use and maximize the membership tools from ATD, especially "Power Member" resources available at <a href="http://td.org/jointmembership">td.org/jointmembership</a>.</li> <li>• <a href="#">Request a state list of ATD members</a> 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 workshop if combined with membership, and more, to ATD members.</li> <li>• 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.</li> <li>• Request your chapter's joint membership percentage by contacting your <a href="#">CRM</a>.</li> </ul> <p><b>Where can I go for additional information?</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Ask the Professionals: Membership Webinar</a></li> <li>• <a href="#">Marketing Materials Request</a></li> <li>• <a href="#">Power Member Marketing Materials</a></li> </ul> <p><b>Samples from chapters:</b></p> <p><a href="#">Sharing Our Success (SOS) Submissions: Joint Membership</a></p>

## CARE FOUNDATIONAL ELEMENT MATRIX

# CARE Resources

	<p>their organizations and in turn impact the employees, productivity, and their organization's bottom line more significantly.</p> <p>One of ATD's strategies is to lead the talent development profession. When there is greater joint chapter/ATD membership, there is better alignment within the association. By working together, ATD and chapters will be more successful in leading the profession.</p>	
Chapter completes ten joint membership or Power membership activities of its choice.	Chapters that focus on joint membership promotional activities tend to have more joint (Power) members. This requirement will assist chapters with planning for success in this area. Many chapters are already doing most of these activities, and many are simple to add and maintain for continued success.	<p><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>• Use the CARE Planning Tool to track your progress.</li> <li>• Identify activities that resonate with your chapter and its members by tracking their impact.</li> <li>• Familiarize yourself with ATD member benefits to determine how they might fit in the chapter's programming/professional development strategy.</li> </ul> <p><b>Where can I go for additional information?</b></p> <ul style="list-style-type: none"> <li>• Joint Membership Activities Job Aid <ul style="list-style-type: none"> <li>◦ <a href="#">PDF</a></li> <li>◦ <a href="#">Webpage</a></li> </ul> </li> </ul>

# SOS Categories & Highlights

Joint Membership Volunteer Recruitment	Membership Campaign New Member Orientation	Member Recognition Member Retention	Membership Surveys Member Engagement
Launch Your Chapter to Power Member Super Star Status, Tulsa, 2019	Chapter Value Proposition, Central Indiana, 2021	Recognizing Chapter Volunteers With Digital Badges, NYC, 2020	Member Survey, Mid-New Jersey, 2021
Leveraging National Membership Benefit for Chapter Book Club, Pittsburg, 2018	Multipronged Engagement Strategy to Increase Membership, Atlanta, 2021	Getting to Know ATD MAC and Special Thank-You Mailing Surprise, Madison Area, 2021	
Train Your Board to Recruit!, Nebraska, 2022	Orientation and Engagement, Kansas City, 2018	A Special Thank You For Renewing Members, Research Triangle, 2021	Membership Engagement & Incentive Program, Baton Rouge, 2023
Marketing a project-based, event-planning internship, Buffalo-Niagara, 2023	Welcome Letter with Easy Links, Bay Colonies, 2023	Book Swap as a Value Add, Madison Area, 2019	The Most Powerful Engagements Start Small, Greater Twin Cities, 2022

# Membership Toolkits (CLC)

Resource	Description / Why	Questions to answer
<a href="#"><u>Annual Membership Survey Job Aid</u></a>	Use the membership survey template to help develop and administer an annual survey	<ul style="list-style-type: none"> <li>• What SHOULD we ask?</li> <li>• How to ask about demographic info?</li> </ul>
<a href="#"><u>Onboarding Toolkit</u></a>	Utilize to create an onboarding program that orients incoming members and familiarizes them with the structure and culture of the chapter	<ul style="list-style-type: none"> <li>• What do new members need to know?</li> <li>• Where do members find .....?</li> </ul>
<a href="#"><u>Engaging Students and New Professionals</u></a>	Provides tips and suggested resources to help chapters reach out to students, local higher education institutions, and new professionals	<ul style="list-style-type: none"> <li>• How do we build a strategic plan?</li> <li>• What questions should we answer to set this up?</li> </ul>
<a href="#"><u>Developing a Chapter Awards Program Toolkit</u></a>	Assists chapters in development and implementation of an awards and recognition program	<ul style="list-style-type: none"> <li>• How to identify which awards to celebrate?</li> <li>• How to set up a fair selection process?</li> </ul>
<a href="#"><u>Chapter Interest Group Toolkit</u></a>	How to establish special interest groups (SIGs) and geographic interest groups (GIGs) within your chapter as well as manuals, samples, and best practices from fellow chapters	<ul style="list-style-type: none"> <li>• When to create a SIG/GIG?</li> <li>• How do we set one up?</li> <li>• What tips/tricks apply to SIG/GIG?</li> </ul>



# Chapter Leader Community: Membership Resources

The screenshot displays the 'Best Practices' section of the ATD Chapters website. At the top, there are three buttons: 'CARE: Chapter Affiliation Requirements', 'Chapter of the Month (COM)', and 'Sharing Our Success (SOS)'. Below these, a navigation bar includes links for 'Administration', 'Finance', 'Membership' (highlighted with a green box), 'Board Development', 'Communications & Marketing', and 'Succession Planning'. The main content area, also outlined in green, provides information about Power Membership resources and chapter membership on the ATD Store. A green arrow points from the 'Membership' tab to a banner at the bottom titled 'Embedding Diversity, Equity & Inclusion into Chapter Operations'.

## Best Practices

Find best practices, resources, and programs that are easy to implement for every chapter.

**CARE: Chapter Affiliation Requirements** **Chapter of the Month (COM)** **Sharing Our Success (SOS)**

Administration Finance **Membership** Board Development Communications & Marketing Succession Planning

Toolkits and materials are available to help chapter leaders market Power Membership.

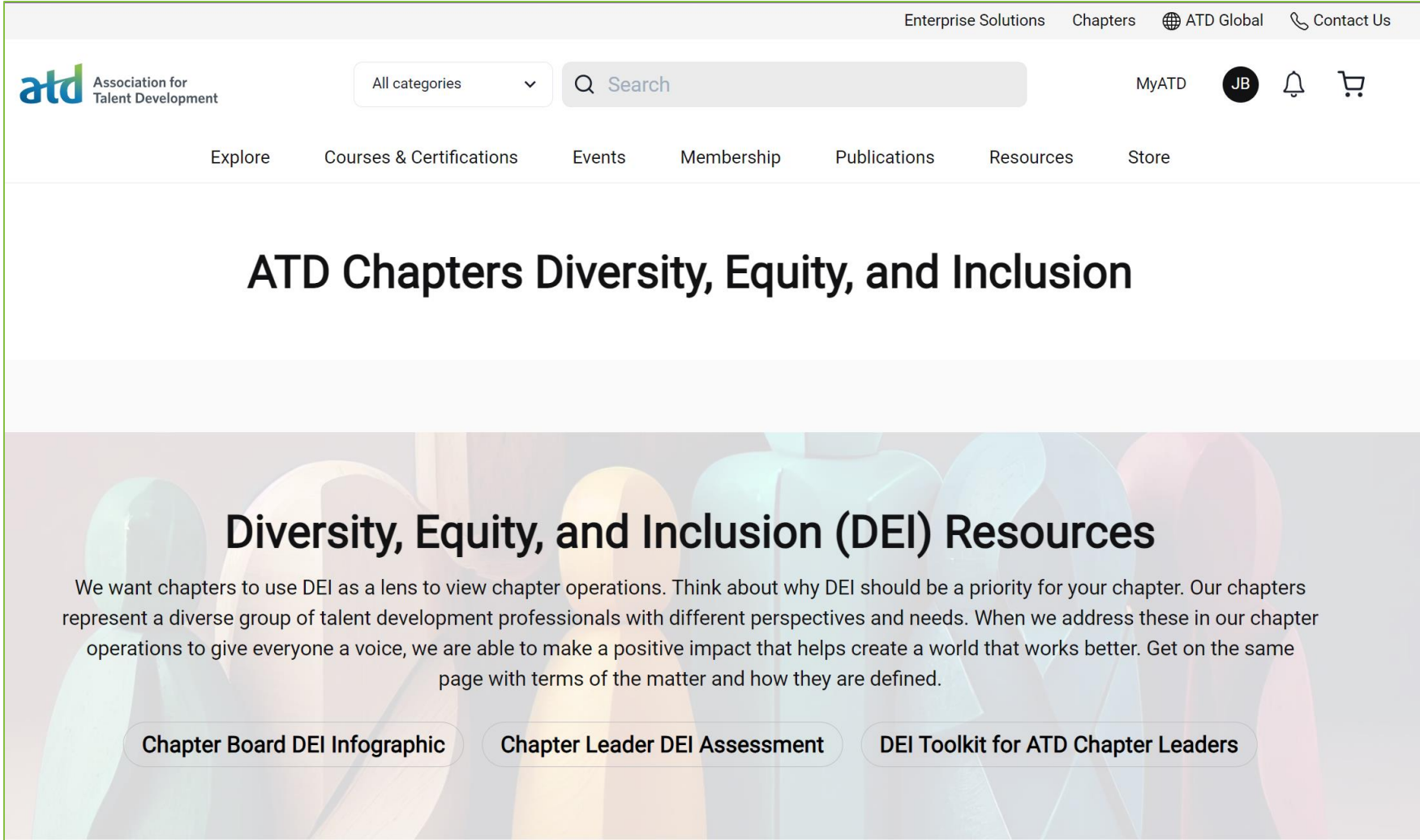
- **Power Membership Resources**  
Power Membership can assist chapters with retaining current members and recruiting new members. Through joint membership, members can thrive within the talent development profession locally and nationally.
- **Chapter Membership on the ATD Store**  
To provide a streamlined customer experience, support joint membership efforts, and lessen administrative burdens for chapter leaders, chapter membership is now available for purchase on the ATD Store.

## 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**



# Membership Materials (DEI)






The screenshot shows the ATD website interface. At the top, there's a navigation bar with links for Enterprise Solutions, Chapters, ATD Global, and Contact Us. Below this is a header section with the ATD logo, a search bar, and user account options (MyATD, JB, notifications, and a shopping cart). A secondary navigation bar lists categories: Explore, Courses & Certifications, Events, Membership, Publications, Resources, and Store. The main content area features a large heading "ATD Chapters Diversity, Equity, and Inclusion" followed by a sub-heading "Diversity, Equity, and Inclusion (DEI) Resources". Below the sub-heading is a paragraph explaining the importance of DEI for chapters. At the bottom, there are three buttons: "Chapter Board DEI Infographic", "Chapter Leader DEI Assessment", and "DEI Toolkit for ATD Chapter Leaders".

Enterprise Solutions Chapters  ATD Global  Contact Us

**atd** Association for Talent Development

All categories   Search

MyATD   

Explore Courses & Certifications Events Membership Publications Resources Store

## 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](#)

Wednesday,  
November 6<sup>th</sup>

@ 2:00pm ET  
(1:00 pm CT/  
12 pm MT/  
11am PT)

# Toolkits

ATD provides chapter leaders with information in the form of Toolkits. Chapter leaders who are responsible for that functional area should use these resources to support chapter development.

# Toolkits

TOOLKIT TOPIC	TOOLKIT DESCRIPTION
<a href="#">Annual Membership Survey Job Aid</a>	Use the membership survey template to help develop and administer an annual survey.
<a href="#">Area Chapter Leaders Conference Toolkit</a>	Provides information on how to outline the full life-cycle process of bringing chapter leaders for a day of networking and best practice sharing.
<a href="#">ATD Certification Toolkit</a>	Serves as a guide for chapters to support CPTD and APTD certifications and enhance chapter membership value. <a href="#">Access Chapter Resources for the Talent Development Capability Model here.</a>
<a href="#">Chapter Finance Toolkit</a>	Designed as a resource for a chapter finance officer, provides important inform
<a href="#">DEI Toolkit</a>	Developed to assist ATD Chapter Leaders in discovering ways to incorporate DEI in all aspects of chapter operations.
<a href="#">990 Filing Information</a>	The guide provides information on filing a 990 or 990-N for the chapter.
<a href="#">Chapter Interest Group Toolkit</a>	Provides a guide on how to establish special interest groups (SIGs) and geographic interest groups (GIGs) within your chapter as well as manuals, samples, and best practices from your fellow chapters.
<a href="#">Chapter Risk Assessment Guide</a>	Designed to be used by chapter board members to evaluate risk and determine strategies for mitigation.
<a href="#">Chapter Incentive Program (ChIP) Toolkit</a>	Includes templates, marketing messages, materials, and best practices to help chapters maximize ChIP revenue potential.



A group of five people are seated on a stage in a modern setting, likely a conference or event. From left to right: a man with blonde hair and a beard wearing a green sweater; a man with a beard wearing a tan cap and a grey sweater; a woman with blonde hair and glasses wearing a plaid shirt, holding a microphone; a man with dark hair and a beard wearing a light blue shirt and a denim vest; and a man with a beard wearing a plaid shirt. They are all looking towards the right side of the frame. The background consists of a dark grey wall and a wooden panel on the left. The text 'PANEL DISCUSSION' is overlaid in the center in a large, white, sans-serif font, with a thin white horizontal line underneath it.

# PANEL DISCUSSION

Membership

# Welcome Panelists!



Clifton Clarke

Home Chapter: Detroit

[linkedin.com/in/cliftonclarke](https://www.linkedin.com/in/cliftonclarke)



Julie Miller

Home Chapter: Baton Rouge

[linkedin.com/in/julie-miller-66a09660](https://www.linkedin.com/in/julie-miller-66a09660)



Danielle Buscher, CPTD

Home Chapter: St Louis

[linkedin.com/in/daniellebuscher](https://www.linkedin.com/in/daniellebuscher)





# LARGE GROUP DISCUSSIONS

---

Membership

Be creative



**What advice  
would you give to  
new membership  
volunteers on  
effectively  
managing member  
data and  
communications?**





**What  
strategies/ideas  
did you use to  
increase  
membership  
retention and  
acquisition?**



**How did you  
build a strong  
sense of  
community  
among the  
membership?**





**ANY QUESTIONS  
TO DISCUSS?**



# Q&A

