



CHAPTERS
Association for
Talent Development

Chapter Leader Success Series Role-specific Onboarding

Marketing/Communications Role
October 29, 2024

Agenda

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



Dana Vogelmeier, CPTD

Home Chapter: Central Ohio

National Advisor for Chapters (NAC)
supporting:

Chapters: Lake Superior, Twin Cities, Hawkeye, Central
Iowa, Mississippi Valley

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



ROLE-BASED RESOURCES

MarComm

CARE FOUNDATIONAL ELEMENT MATRIX

CARE Resources

COMMUNICATION		
<p>The chapter maintains a current website with up-to-date information.</p>	<p>A current website provides a common access point for any existing or prospective member to obtain information about chapter programs, membership, and leadership opportunities. Having a current and well-maintained website also helps the chapter portray itself as being connected to common business practices.</p>	<p>Recommendations on how to accomplish:</p> <ul style="list-style-type: none"> • Make chapter contact and membership information easily accessible. • Periodically review website to ensure content is current and hyperlinks are functional. • Ensure the website conforms to ATD's brand (logo) identity guidelines. Chapters must use their chapter-specific logo obtained from ATD in accordance with the instructions specified in ATD's Logo and Graphics Standards. <p>Where can I go for additional information?</p> <ul style="list-style-type: none"> • Chapter Marketing Materials and ATD Branding Guidelines • Free Content From ATD <p>Samples from chapters: Chattanooga Area's Website Metro DC's Website Puget Sound's Website</p>
<p>The chapter distributes a communication piece to members at least once per quarter that includes chapter and ATD programs and initiatives.</p>	<p>Regularly scheduled communications are an effective way to make members aware of chapter events and other news. Informed members are more likely to participate in chapter and ATD activities/services. As a result, members will obtain greater value from their membership and be more inclined to keep their ATD membership current.</p>	<p>Recommendations on how to accomplish:</p> <ul style="list-style-type: none"> • Update members on chapter and ATD events using a combination of these methods: <ul style="list-style-type: none"> ◦ website postings ◦ announcements at meetings ◦ email communication / newsletters ◦ Twitter / LinkedIn and/or Facebook groups ◦ postcard invitations to chapter events • Ensure all communication, hard copy and electronic, conform to ATD's brand (logo) identity guidelines. Chapters must use their chapter-specific logo obtained from ATD in accordance with the instructions specified in ATD's Logo and Graphics Standards. <p>Where can I go for additional information?</p> <ul style="list-style-type: none"> • ATD Chapters Social Media Channels • Marketing Materials Request • ATD Sharing Our Success (SOS) Program <p>Samples from chapters: Nebraska: Quarterly Newsletter New York City: Video Briefing</p>

CARE FOUNDATIONAL ELEMENT MATRIX

<p>The chapter board produces, and shares with members, an annual report that includes but is not limited to:</p> <ul style="list-style-type: none"> • membership numbers • financial performance • progress toward annual goals. 	<p>Providing a year-end report on the state of the chapter reminds members of the services the chapter provides and that their chapter leaders are working to meet members' needs. This type of professionalism increases members' confidence in the chapter and in the investment they make in it. By more fully knowing about the state of the organization, members have a greater sense of ownership in the chapter.</p>	<p>Recommendations on how to accomplish:</p> <ul style="list-style-type: none"> • Produce the report in a simple format, such as electronic or PowerPoint, to report on efforts and celebrate accomplishments in each functional area. The annual report does not need to be a lengthy document. • Share the annual report with members via website, email, program meeting, newsletter, or the like. <p>Where can I go for additional information?</p> <ul style="list-style-type: none"> • Annual Report Template • ATD Sharing Our Success (SOS) Program <p>Samples from other chapters: Kansas City: Annual Report with Infographic - 2014 Annual Report Chattanooga's Annual Report Greater Cincinnati's Annual Report</p>
<p>Board members hold, at minimum, an annual phone call with their CRM to identify opportunities for support.</p>	<p>The chapter services team is here to assist chapters and support their needs. Your CRM has skills and insights to contribute to virtually every domain of component operations: governance and structure, leadership, management and administration, internal and external relations, and programs and services. With regular check-ins, the CRM can help ensure the chapter is equipped with the tools needed to succeed.</p>	<p>Recommendations on how to accomplish: CRMs are here to:</p> <ul style="list-style-type: none"> • lead virtual meetings to familiarize chapter board members with resources available from ATD • participate in a board meeting or retreat in person or via conference call • connect boards with other chapter leaders around the country and best practices • provide administrative, membership, and marketing guidance • conduct phone meetings with board members. <p>Where can I go for additional information?</p> <ul style="list-style-type: none"> • Chapter Services Team

SOS Categories & Highlights

Annual Report	Communication Strategy	Marketing and Communication Strategy	Chapter Website
Annual Report with Infographic, Kansas City Chapter, 2014	Defining Chapter Strategy Through Market Landscape Analysis, Southeastern Wisconsin, 2021	“Get to Know Your Chapter” Video Series, Bay Colonies, 2022	Wild Apricot sidekick guide, New York City, 2023
Highlight Film, Hawaii, 2018	Three-Pronged Approach to Marketing, Chicagoland, 2019	An innovative way to promote the Chapter Incentive Program (ChIP) and increase the chapter’s revenue, Cuyahoga Valley, 2020	Website Revamp Project, Metro DC, 2021

MarComm Toolkits (CLC)

Resource	Description / Why	What	Questions to answer
Chapter Incentive Program (ChIP) Toolkit	Includes templates, marketing messages, materials, and best practices to help chapters maximize ChIP revenue potential.	Key Messages for Marketing, Audiences and tactics for spreading awareness, Examples, FAQs	<ul style="list-style-type: none"> • What are ChIPs? • How can my role support increasing ChIP revenue?
Chapter Communications Toolkit	Provides templates and examples for chapters to develop an annual communications plan and associated communications materials.	Support for designing a communications plan, measurement and evaluation, internal vs external comms, delivery methods, samples, templates, and other resources	<ul style="list-style-type: none"> • What is a communications plan? • What are some tools, tactics, or strategies I can deploy to increase chapter visibility? • How can I measure the effectiveness of our marketing efforts and campaigns?
Employee Learning Week (ELW) Toolkit	Resources to help you recognize and support ELW	ELW Resources including Downloads, PowerPoint Templates, Logos, Web Banners, Media Tips, Press Release Templates	<ul style="list-style-type: none"> • What is Employee Learning Week? • What are some easy wins for helping my chapter support ELW this year? • Where can I find templates and collateral for spreading the word about ELW?

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.**

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

Administration

Finance

Membership

Board Development

Communications & Marketing

Succession Planning

Stay up-to-date about ATD by accessing the latest Leader Connection Newsletter (LCN), networking through social media groups, and requesting marketing materials.

- **Leader Connection Newsletter (LCN)**

This monthly newsletter provides the news you need to run a successful chapter! Check your inbox each month for the LCN and access past issues on the website.

- **ATD Chapter Leaders LinkedIn Group**

Connect with other volunteer chapter leaders and ATD chapter services staff in our private chapter leader LinkedIn group.

- **Marketing and Branding Materials**

ATD provides materials about ATD membership, programs, and initiatives, which chapters can distribute individually or on a table display at an event or meeting.

CLC: Marketing Materials

td.org/chapters/clc/marketing-and-branding

ATD Marketing Materials Request Form

Request ATD materials for your chapter's event. Please request materials at least 3 weeks prior to the date needed.

We will try our best to meet the request as submitted, but materials and quantity are subject to availability. Please note that bulk item giveaways are not available.

Chapter Name:*

Contact Name:*

First Name

Last Name

Contact Email:*

Physical Mailing Address (no PO boxes):*

Address Line 1

Address Line 2

<https://www.td.org/chapters/clc/marketing-and-branding>

td.org/chapters/clc/marketing-and-branding

Marketing Resources

[Collapse All](#)

Chapter Font Access Request Form

To maintain consistency in ATD's graphic identity, it is recommended copy be set in typefaces from Whitney HTF and Mercury. To support chapters with this recommendation, ATD is committed to providing each chapter with one computer license to access and use these fonts. Please use [this form](#) to request a license for these fonts for your chapter.

Chapter Social Media Avatar Request Form

Social media avatars differ from chapter logos. Request an avatar your chapter can use on social media, including Facebook, LinkedIn, Twitter, and more. Please use [this form](#) to request a social media avatar for your chapter.

PowerPoint Template

Download the [job aid](#) to customize the PowerPoint template with your chapter logo. Here is the [PowerPoint template](#) as well.

Business Card Template

Use this [template](#) to customize your chapter board member's business cards.

A photograph of a panel discussion. Five people are seated on a stage in blue chairs. From left to right: a man with blonde hair in a green sweater, a man in a tan cap and grey hoodie, a woman with blonde hair and glasses in a plaid shirt holding a microphone, a man with dark hair in a denim vest, and a man with a beard in a plaid shirt. The background is a dark wall with a whiteboard. The text 'PANEL DISCUSSION' is overlaid in white, bold, sans-serif font, with a white horizontal line underneath it.

PANEL DISCUSSION

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Welcome Panelists!



Lindsey Egan
VP of Marketing &
Communications

Home Chapter: Rochester Chapter



Debbie Richards
President Emeritus
Past President X 2

Former

VP Of Gigs and Sigs
VP of MarComm 3 x
Former NAC

Home Chapter: Houston



Valentina Pribble
Director of Finance

Former

Director of Communications
Survey Coordinator

Home Chapter: ATD Puget Sound



LARGE GROUP DISCUSSIONS

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Be creative



**WHAT ARE YOUR
GOALS FOR
ENHANCING
YOUR
CHAPTER'S
BRAND AND
VISIBILITY?**



**HOW CAN WE
EFFECTIVELY
LEVERAGE DIGITAL
PLATFORMS AND
SOCIAL MEDIA TO
REACH OUR
TARGET
AUDIENCE?**

**WHAT ARE YOUR
IDEAS FOR
CREATING
ENGAGING
CONTENT THAT
WILL RESONATE
WITH YOUR
MEMBERS?**





**ANY QUESTIONS
TO DISCUSS?**

Q&A

