

# CARE FOUNDATIONAL ELEMENT MATRIX

Chapters are expected to meet each item listed in the CARE Foundation tier. To be CARE Plus achieved, a chapter must complete the required number of items in each category in addition to achieving CARE at the foundational level. For questions, please contact your [chapter relations manager](#) (CRM).

CARE Foundational Element	Why	How
<b>BOARD OF DIRECTORS</b>		
<p>The chapter board meets at least once per quarter and makes meeting minutes available to members.</p>	<p>Board meetings are the time and place for chapter leaders to monitor the chapter’s financial situation, address chapter issues, agree upon solutions, communicate the status of ongoing projects, and develop future chapter leaders. Since the board makes legally binding decisions for the chapter, it is a good practice for leaders to share the results of these meetings with chapter members. This builds members’ trust and gives them an opportunity to engage in chapter activities, including volunteering.</p>	<p><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>• Organize board meetings via these venues: <ul style="list-style-type: none"> <li>• in person (recommended)</li> <li>• virtual (conference call, web conferencing, among other ways).</li> </ul> </li> <li>• Maximize meeting effectiveness by following standard meeting guidelines such as using an agenda, establishing timeframes, and encouraging contribution for instance.</li> <li>• Capture minutes and share with members how meeting minutes can be accessed. Minutes may share key decisions and actions rather than detailed minutes of who said what.</li> </ul> <p><b>Samples from other chapters:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">New York City: Board Meeting Position Status Report SOS</a> with <a href="#">Minutes Template</a> and <a href="#">Status Report Template</a></li> <li>• <a href="#">Tulsa Board Meeting Minutes</a></li> <li>• <a href="#">Valley of the Sun: Board Meeting Minutes Collaboration</a></li> </ul>
<p>The chapter submits a current board roster in Excel with CARE submission and updates ATD Chapter Services as changes</p>	<p>Providing a current board roster as well as updates when changes occur helps build a connected ATD community. This allows for the dissemination of information about programs, initiatives, and resources to</p>	<p><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>• Submit a current chapter board roster to ATD Chapter Services using the MS Excel board roster template available at <a href="http://td.org/CARE">td.org/CARE</a>.</li> <li>• If any changes occur during the year, resubmit an updated Excel version directly to your <a href="#">chapter relations manager</a> (CRM).</li> <li>• Include with the roster information:</li> </ul>

# CARE FOUNDATIONAL ELEMENT MATRIX

CARE Foundational Element	Why	How
occur.	all chapter leaders. These volunteers can also connect with leaders of other chapters for networking and sharing ideas. Similarly, potential members and interested parties can more easily access the leaders in their own local area if contacting ATD for contact information.	<ol style="list-style-type: none"> <li>1. ATD member ID (if available)</li> <li>2. first and last names</li> <li>3. board position</li> <li>4. job title (optional)</li> <li>5. company name (optional)</li> <li>6. address</li> <li>7. email address</li> <li>8. preferred phone number</li> <li>9. term expiration.</li> </ol> <p>Please only use this <a href="#">Excel spreadsheet</a> also found on <a href="http://atd.org/care">atd.org/care</a></p>
The chapter board members maintain joint chapter/ATD national membership and participate in both annual chapter and ATD leadership development opportunities.	<p>Leaders who are ATD members have a broader understanding of the association and the industry. This world view helps them lead their chapter and more effectively serve their members.</p> <p>Moreover, one reason members volunteer to serve their chapter is to develop their leadership skills. Providing annual leadership development opportunities helps volunteers obtain these competencies.</p>	<p><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>• Encourage board members to take advantage of the discounted \$199 membership rate for chapter board members. The chapter may consider subsidizing all or a portion of the membership fee.</li> <li>• Chapter leadership development opportunities may include: <ul style="list-style-type: none"> <li>• board orientation</li> <li>• board retreats</li> <li>• mentoring program</li> <li>• leader transition meeting</li> <li>• area conferences</li> <li>• chapter peer-to-peer learning.</li> </ul> </li> <li>• Take advantage of ATD leadership development opportunities such as: <ul style="list-style-type: none"> <li>• <a href="#">ATD Chapter Leaders Conference (ALC)</a></li> <li>• Leadership training by <a href="#">chapter relations managers</a> (CRM) or <a href="#">National Advisor for Chapters</a> (NAC)</li> <li>• <a href="#">ATD chapter-wide webinars for chapter leaders</a> and <a href="#">webinar past recordings</a></li> <li>• <a href="#">LinkedIn</a></li> </ul> </li> </ul>

# CARE FOUNDATIONAL ELEMENT MATRIX

CARE Foundational Element	Why	How
		<p><b>Where can I go for additional information?</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Chapter Leader Membership Application</a></li> <li>• <a href="#">Chapter Leader Team Application</a></li> <li>• <a href="#">Chapter Leader Webinar Archives</a></li> </ul>
<p>The chapter maintains written position descriptions for elected chapter board members.</p>	<p>Written position descriptions ensure that chapter management responsibilities are fully covered. They explain to volunteer leaders what is expected of them and how each leader fits into the overall organization. Descriptions also underscore the importance of the chapter’s volunteer jobs and will encourage leaders to approach them more seriously and professionally.</p>	<p><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>• Develop and provide position descriptions that clearly define roles and responsibilities for all elected leadership positions. Although optional, consider developing and providing position descriptions for appointed leadership positions as well.</li> <li>• Include all important tasks or responsibilities using input from people who have held the positions in the past, as well as the current office holders.</li> <li>• Include a realistic estimate of the amount of time the function is expected to take each month in each position description.</li> <li>• Review position descriptions on an annual basis and update as needed.</li> </ul> <p><b>Where can I go for additional information?</b></p> <ul style="list-style-type: none"> <li>• <a href="#">ATD Sample Position Descriptions</a></li> <li>• <a href="#">ATD Sharing Our Success (SOS) Program</a></li> <li>• <a href="#">Onboarding and Succession Planning Resources</a></li> <li>• <a href="#">Chapter Leader Onboarding Checklist</a></li> </ul> <p><b>Samples from other chapters:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Buffalo Niagara’s Board Position Descriptions</a></li> <li>• <a href="#">Greater Las Vegas’s Board Position Descriptions</a></li> <li>• <a href="#">Los Angeles’s Board Position Descriptions</a></li> </ul>

# CARE FOUNDATIONAL ELEMENT MATRIX

<b>GOVERNANCE</b>		
<p>The chapter creates an operational plan that includes but is not limited to:</p> <ul style="list-style-type: none"> <li>annual goals</li> <li>communication and marketing strategies</li> <li>recruitment and retention strategies</li> <li>a succession planning strategy.</li> </ul>	<p>The chapter operational plan provides a framework for doing business effectively and managing resources efficiently. It states how the chapter will achieve outlined goals and objectives so that chapter activities are consistent and target member needs. It outlines how board members will share information with each other and with their stakeholders. By documenting recruitment and retention and succession planning strategies, chapter leaders are providing the framework needed for chapter growth and sustainability. The operational plan also provides a clear reference point to evaluate and redirect chapter efforts as needed.</p>	<p><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>Identify the objectives, tasks, and timelines associated with each annual goal and major strategy area based on member needs.</li> <li>Annually review and update, if necessary, your operational plan to ensure it aligns with the chapter’s mission and vision.</li> <li>Use the operational plan to identify how the chapter will address CARE elements throughout the year.</li> </ul> <p><b>Where can I go for additional information?</b></p> <ul style="list-style-type: none"> <li><a href="#">ATD Operational Plan Template</a></li> </ul> <p><b>Samples from other chapters:</b></p> <ul style="list-style-type: none"> <li><a href="#">Central Massachusetts’s Operational Plan</a></li> <li><a href="#">Detroit’s Operational Plan</a></li> <li><a href="#">San Diego’s Operational Plan</a></li> <li><a href="#">West Virginia’s Operational Plan</a></li> </ul>
<p>The chapter’s mission, vision, and bylaws align with those of ATD. Additionally, the chapter meets the ATD brand identity guidelines.</p> <p>*The chapter may also maintain transparency by making board meeting minutes and summaries available to members.</p>	<p>The chapter’s definition of its purpose as well as its governing policies should align with those of ATD.</p> <p>Meeting the ATD brand guidelines protects brand integrity and creates a consistent and professional presentation of the ATD name and logo. When a brand is perceived as having consistent value and integrity, it makes it easier for the organization to gain and retain members and partners.</p>	<p><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>Review the chapter’s mission and vision to ensure its alignment to ATD.</li> <li>Review the chapter’s bylaws on an annual basis and make changes as appropriate.</li> <li>Ensure all chapter operations reflect the processes documented in the bylaws.</li> <li>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 2024 Logo and Graphic Standards for ATD Chapters.</li> <li>Make board meeting minutes and summaries available to members.</li> <li>Maintain and update SOPs annually or as needed throughout the year.</li> <li>Ensure there is a central repository or document library for archiving important chapter documents.</li> </ul>

# CARE FOUNDATIONAL ELEMENT MATRIX

		<p><b>Where can I go for additional information?</b></p> <ul style="list-style-type: none"> <li>• <a href="#">ATD’s Mission and Vision</a></li> <li>• <a href="#">ATD Brand Chapter Style Guide</a></li> <li>• <a href="#">ATD Sharing Our Success (SOS) Program</a></li> <li>• <a href="#">Model Bylaws</a></li> </ul> <p><b>Samples from other chapters:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Cascadia’s Mission and Vision</a></li> <li>• <a href="#">San Antonio’s Mission and Vision</a></li> <li>• <a href="#">Greater Atlanta’s Mission and Vision</a></li> <li>• <a href="#">Charlotte Area’s Mission and Vision</a></li> </ul>
<p>The chapter complies with federal and state reporting requirements. Submission of 990/990-N filings and confirmation of acceptance (if applicable) to chapter services is required.</p>	<p>According to the National Center for Nonprofit Boards, one of the 10 basic responsibilities of nonprofit boards is to manage the nonprofit organization’s resources effectively. Complying with federal and state financial reporting requirements protects the chapter from costly penalties and safeguards its tax exempt status. Thus, this is an important component of the board’s fiduciary responsibility.</p> <p>Compliance includes filing federal and state tax forms. State requirements for nonprofit organizations vary.</p>	<p><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>• Apply for and obtain a 501(c)(3) tax exempt classification if your chapter is not already designated as one. It will exempt the chapter from most federal income taxes, and contributions made to the chapter will be tax deductible by the donor. An easy way to do this is to check with ATD whether the chapter is included in ATD’s group exemption, which automatically grants 501(c)(3) status to participating chapters.</li> <li>• Apply for a unique Federal Identification Number, also known as an Employee Identification Number (EIN), if your chapter does not already have one. Your CRM can provide details on the application procedure.</li> <li>• Consult with your state’s department of taxation or revenue or a local CPA familiar with nonprofit tax issues to determine any tax filing and reporting requirements.</li> <li>• All chapters are required to file either a 990-N or a 990-EZ/Form 990 with the IRS for each calendar year. <b>Chapters that fail to file may lose their tax-exempt status and will be dropped from ATD’s group tax exemption (if the chapter is currently participating in this option) and will be ineligible to be a part of this group in the future.</b> Click <a href="#">here</a> to access the 990-N. The 990-N or 990-EZ/Form 990 is due every year by the 15th day of the 5th month after the close of the chapter’s tax year (for most chapters, usually May 15). Visit <a href="http://www.irs.gov/">http://www.irs.gov/</a> for more information.</li> </ul> <p><b>Where can I go for additional information?</b></p> <ul style="list-style-type: none"> <li>• <a href="#">990 Filing Job Aid</a></li> </ul>

## CARE FOUNDATIONAL ELEMENT MATRIX

		<ul style="list-style-type: none"> <li>• <a href="#">Incorporation Information</a></li> <li>• <a href="#">ATD Group Tax Exemption Info</a></li> <li>• <a href="#">Business Acumen Chapter Assessment</a></li> </ul> <p><b>Samples from other chapters:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">South Carolina: Making VP of Finance EZ</a> and <a href="#">SOP for Filing 990-N and 990-EZ Tax Returns</a></li> </ul>
<p>The chapter members participate in the nomination and election of the chapter board.</p>	<p>The nomination and election process makes sure key management functions are covered, even if one board member is responsible for more than one function. Providing members, the opportunity to nominate and elect their leaders builds members’ trust and ensures the board is truly representative of the membership. It also gives all members an opportunity to engage in chapter activities, including volunteering.</p>	<p><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>• Review and follow your chapter's bylaws for procedures on election of chapter officers.</li> <li>• Use position descriptions when recruiting candidates.</li> <li>• Use a nominations committee to identify and recruit volunteer leaders.</li> <li>• Start the process early to allow sufficient time to identify candidates, announce the slate, allow members to vote, and publish the results.</li> </ul> <p><b>Where can I go for additional information?</b></p> <ul style="list-style-type: none"> <li>• <a href="#">ATD Sharing Our Success (SOS) program</a></li> <li>• <a href="#">Quick Recruiting Tips</a></li> <li>• <a href="#">Recruiting Dashboard and Candidate Tracker</a></li> </ul> <p><b>Samples from other chapters:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Central Florida: Chapter Elections in a Digital Box</a></li> <li>• <a href="#">Nebraska: Timely Succession Planning, Candidate Interview Process, and Succession Planning Worksheet</a></li> </ul>

# CARE FOUNDATIONAL ELEMENT MATRIX

FINANCE		
<p>The chapter board develops and approves an annual operating budget and makes it available to members.</p> <p><i>*Chapters are required to submit its most recent year-end balance sheet and profit and loss statement.</i></p>	<p>Preparing and managing a chapter operating budget helps leaders plan for and deliver products and services that meet member needs without exceeding the chapter's financial resources. In addition to defining the year's projected revenue and expenses, it provides leaders an ongoing tool to evaluate and redirect chapter efforts when necessary. It is also useful as a historical reference when planning the next years' activities. An annual operating budget should be developed regardless of a chapter's size or income.</p>	<p><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>• Develop a budget:               <ol style="list-style-type: none"> <li>1. Assess the chapter's current financial position.</li> <li>2. Review the chapter's goals and existing programs and services based on members' needs.</li> <li>3. Estimate revenue for the coming year.</li> <li>4. Estimate expenses for the coming year.</li> <li>5. Prepare budget worksheets for each program and administrative area.</li> <li>6. Compile all program and administrative budgets into an overall annual chapter budget.</li> <li>7. Have board approve final budget:</li> </ol> </li> <li>• Publish final budget in chapter newsletter or member mailing or make it available to members electronically.</li> <li>• Review the budget at mid-year (recommended) and adjust as necessary. Establish a reserve account for unexpected expenses.</li> <li>• Submit a current balance sheet and income statement to ATD chapter services.</li> </ul> <p><b>Where can I go for additional information?</b></p> <ul style="list-style-type: none"> <li>• <a href="#">5 Tips for Strong Association Financial Management</a></li> <li>• <a href="#">Balance Sheet Template</a></li> <li>• <a href="#">Budget Template</a></li> <li>• <a href="#">Chapter Incentive Program (ChIP)</a></li> <li>• <a href="#">Income Statement Template</a></li> </ul> <p><b>Samples from chapters:</b></p> <ul style="list-style-type: none"> <li>• Central Iowa Chapter's Budgeting Planning <a href="#">Spreadsheet</a> and <a href="#">Financials</a></li> <li>• <a href="#">Kansas City Chapter's Event Budget Tool</a></li> <li>• Nebraska Chapter's Transparent Budget Reports: <a href="#">Budget Template</a> and <a href="#">Expenses Reporting</a></li> <li>• <a href="#">Southeastern Wisconsin: Financial Health E-Newsletter: Sample Newsletter</a> and <a href="#">Graph Template</a></li> </ul>

# CARE FOUNDATIONAL ELEMENT MATRIX

<p>The chapter board ensures an annual internal or external financial review is completed by an individual or group not directly responsible for the management of the chapter's finances.</p>	<p>Conducting an annual internal/external review verifies that established policies, procedures, and internal controls are being followed in the daily operations of the chapter. Reviews assure that collected monies, such as members' dues, are accounted for and being used properly. It also confirms that the accounting records and financial statements are accurate and complete. Therefore, this is an important component of the board's fiduciary responsibility.</p>	<p><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>• Conduct internal and external reviews on an alternating basis.</li> <li>• Have an accountant or other financial manager perform the external review.</li> <li>• Have a member-based committee conduct the internal review, provided the members are not directly responsible for the chapter's financial management.</li> </ul> <p><b>Where can I go for additional information?</b></p> <ul style="list-style-type: none"> <li>• <a href="#">ATD Sharing Our Success (SOS) program</a></li> <li>• <a href="#">Chapter Finance Toolkit</a></li> </ul> <p><b>Samples from chapters:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Cascadia: Internal Review Checklist</a></li> <li>• <a href="#">Cascadia: Internal Review Form</a></li> <li>• <a href="#">Pittsburgh: Financial Audit Through Universities</a></li> </ul>
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# CARE FOUNDATIONAL ELEMENT MATRIX

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="http://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>1. last and first names</li> <li>2. job title (optional)</li> <li>3. company name (optional)</li> <li>4. address</li> <li>5. email address (required)</li> <li>6. preferred phone number</li> <li>7. membership expiration.</li> </ol> </li> </ul> <p>Please only use this <a href="#">Excel spreadsheet</a> also found at <a href="http://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

	<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

	<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>	
<p>Chapter completes ten joint membership or Power membership activities of its choice.</p>	<p>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>	<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>

# CARE FOUNDATIONAL ELEMENT MATRIX

PROGRAMMING		
<p>The chapter provides at least six professional development activities per year for members.</p> <p><i>*The chapter may align its programming to the ATD Capability Model. The chapter may also offer a mentoring or virtual study group.</i></p>	<p>A primary reason for members to join ATD is to develop themselves professionally—to acquire new skills, understand industry trends, and connect with other professionals. Offering regularly scheduled educational programs and professional development events is one of the best ways to meet this member need.</p>	<p><b>Recommendations on how to accomplish:</b> Consider using any of the following development activities:</p> <ul style="list-style-type: none"> <li>• chapter meeting</li> <li>• SIG (Special Interest Group) meeting</li> <li>• GIG (Geographic Interest Group) meeting</li> <li>• conference or workshop</li> <li>• networking event</li> <li>• field visit to a corporate university, workplace, college campus, or vendor site</li> <li>• public forum on training issues</li> <li>• guest speaker or panel discussion</li> <li>• joint program with another professional organization such as SHRM, ISPI, ODN.</li> </ul> <p><b>Where can I go for additional information?</b></p> <ul style="list-style-type: none"> <li>• <a href="#">ATD Speaker Request Form</a></li> <li>• <a href="#">ATD Capability Model</a></li> <li>• Explore Content on <a href="#">td.org</a> by Topic</li> <li>• <a href="#">Sharing Our Success: Monthly Meetings</a></li> <li>• <a href="#">Sharing Our Success: Chapter Conferences</a></li> <li>• <a href="#">Sharing Our Success: Programs and Events</a></li> </ul> <p><b>Samples from other chapters:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Austin Calendar of Events</a></li> <li>• <a href="#">Central Indiana Calendar of Events</a></li> <li>• <a href="#">Central Iowa Calendar of Events</a></li> <li>• <a href="#">Orange County Calendar of Events</a></li> </ul>

# CARE FOUNDATIONAL ELEMENT MATRIX

<b>COMMUNICATION</b>		
<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><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>Make chapter contact and membership information easily accessible.</li> <li>Periodically review website to ensure content is current and hyperlinks are functional.</li> <li>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.</li> </ul> <p><b>Where can I go for additional information?</b></p> <ul style="list-style-type: none"> <li><a href="#">Chapter Marketing Materials</a> and ATD Branding Guidelines</li> </ul> <p><b>Samples from chapters:</b>  <a href="#">Metro DC’s Website</a>    <a href="#">Puget Sound’s Website</a></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><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>Update members on chapter and ATD events using a combination of these methods: <ul style="list-style-type: none"> <li>website postings</li> <li>announcements at meetings</li> <li>email communication / newsletters</li> <li>Twitter / LinkedIn and/or Facebook groups</li> <li>postcard invitations to chapter events</li> </ul> </li> <li>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.</li> </ul> <p><b>Where can I go for additional information?</b></p> <ul style="list-style-type: none"> <li><a href="#">Marketing Materials Request</a></li> <li><a href="#">ATD Sharing Our Success (SOS) Program</a></li> </ul> <p><b>Samples from chapters:</b>  <a href="#">Nebraska: Quarterly Newsletter</a>                      <a href="#">New York City: Video Briefing</a></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"> <li>• membership numbers</li> <li>• financial performance</li> <li>• progress toward annual goals.</li> </ul>	<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><b>Recommendations on how to accomplish:</b></p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• Share the annual report with members via website, email, program meeting, newsletter, or the like.</li> </ul> <p><b>Where can I go for additional information?</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Annual Report 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>• Kansas City: Annual Report with Infographic - <a href="#">2014 Annual Report</a></li> <li>• <a href="#">Greater Cincinnati’s Annual Report</a></li> </ul>
<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><b>Recommendations on how to accomplish:</b></p> <p>CRMs are here to:</p> <ul style="list-style-type: none"> <li>• lead virtual meetings to familiarize chapter board members with resources available from ATD</li> <li>• participate in a board meeting or retreat in person or via conference call</li> <li>• connect boards with other chapter leaders around the country and best practices</li> <li>• provide administrative, membership, and marketing guidance</li> <li>• conduct phone meetings with board members.</li> </ul> <p><b>Where can I go for additional information?</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Chapter Services Team</a></li> </ul>