

CHAPTER AFFILIATION REQUIREMENTS (CARE) OVERVIEW

Foundational Requirements and CARE Plus

Chapters are expected to meet each item listed in the CARE Foundational level. CARE Plus is an optional tier in which a chapter should complete at minimum the number of items noted in each category. 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.

CATEGORY

FOUNDATIONAL REQUIREMENTS

CARE PLUS

Board of Directors

- 1.1 **Board Meetings:** Chapter board meets at least once per quarter.
- 1.2 **Board Roster:** Chapter submits an incoming board roster in Excel template.
- 1.3 **Professional Development:** Chapter board members maintain Power Membership (joint chapter/ATD national membership).
- 1.4 **Position Descriptions:** Chapter maintains written position descriptions for elected members.

SELECT 4

- + **Board Member Onboarding:** Chapter provides a defined orientation/onboarding process for new board members.
- + **Succession Plan:** Chapter has a succession strategy for identifying and filling board member positions.
- + **Recruitment Strategy:** Chapter has a volunteer recruitment strategy in place for positions that support board work.
- + **National Advisor for Chapters (NAC) Area Calls:** At least one board member (excluding paid administrators) attends an NAC area call.
- + **ATD Chapter Leaders Conference (ALC):** Chapter has a board member(s) present at ALC annually.
- + **Engagement of Past Presidents:** Chapter has an advisory board or council that involves past presidents in chapter activities.
- + **Strategic Planning:** Chapter board meets to plan for the future.
- + **SOS Submission:** Chapter board submits a best practice to the SOS program.

Governance

- 2.1 **Operating Plan:** Chapter creates and submits an operational plan for the coming year.
- 2.2 **Governing Documents:** The chapter's mission, vision, and bylaws align with those of ATD, and the chapter meets the ATD branding guidelines.
- 2.3 **Government Reporting Requirements:** Chapter complies with federal and state reporting requirements. Submission of 990/990-N filings to chapter services is required.
- 2.4 **Board Selection:** Chapter members participate in the nomination or election of the chapter board.

SELECT 2

- + **Standard Operating Procedures (SOPs):** Chapter board maintains and updates its SOPs annually or as needed throughout the year.
- + **Bylaws Review:** Chapter board reviews its bylaws annually, including a review of the bylaws as part of board member onboarding.
- + **Board Transparency:** Chapter makes board meeting minutes/summaries available to members.
- + **Central Repository:** Board maintains a central repository or document library for archiving important chapter documents.

CATEGORY

FOUNDATIONAL REQUIREMENTS

CARE PLUS

Finance

- 31 **Budget:** The chapter board develops and approves an annual operating budget and makes it available to members.
- 32 **Financial Documents:** Chapter submits most recent yearly balance sheet.
- 33 **Financial Documents:** Chapter submits most recent profit and loss statement.
- 34 **Financial Review:** Chapter board has an internal or external financial review completed annually by a person or group not directly responsible for the management of chapter finances.

SELECT 3

- + **Cash Reserve:** Chapter has approximately three to six months of operating expenses set aside for emergencies.
- + **Risk Assessment:** Chapter board completes a risk assessment and reviews it annually.
- + **Financial Support for Board Development:** Chapter budgets to send board members to the ALC or cover the cost of ATD membership.
- + **Partnership:** Chapter has a partnership strategy that identifies, recruits, and maintains partnerships to support chapter programming and operations.
- + **Sponsorship:** Chapter has sponsors to support chapter programming and operations.

Membership

- 41 **Membership Roster:** Chapter submits year-end membership roster in Excel.
- 42 **Member Feedback:** Chapter board assesses member needs and satisfaction levels at least once per year.
- 43 **Power Membership:** Chapter achieves a minimum of 20 Power Members (joint chapter/ATD national members) and 35 percent simultaneously.
- 44 **Power Member Activities:** Chapter completes 10 Power Member activities of the chapter's choice.

SELECT 6

- + **Recognition:** Chapter has a member/volunteer recognition or spotlight program.
- + **Services:** Chapter offers a job board, consultant referral service, resume workshop, or other service(s) not included in your chapter's member benefit.
- + **New Member Orientation:** Chapter hosts an orientation for new members.
- + **Retention:** Chapter tracks the retention rate of its members and determines a target retention rate to meet annually.
- + **Chapter Membership on the ATD Store:** Chapter makes its membership available on the TD.org website.
- + **Volunteer Recruitment:** Chapter creates awareness about volunteering for the chapter and open positions.
- + **Power Membership:** Chapter achieves a Power Membership rate of 45 percent or higher and the 20 Power Member minimum.
- + **Power Member Activities:** Chapter identifies activities having the most impact on its Power Member rate.
- + **Membership Campaign:** Chapter holds a membership drive to recruit prospective members.

CATEGORY

FOUNDATIONAL REQUIREMENTS

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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.

Communication

- 6.1 **Website:** Chapter maintains a current website with up-to-date information.
- 6.2 **Member Communication:** Chapter distributes a communication piece to members at least once per quarter that features chapter and ATD programs and initiatives.
- 6.3 **Annual Report:** Chapter board shares an annual report at least once per year with members noting: membership numbers, financial performance, and progress toward annual goals.
- 6.4 **National Support:** Board members hold, at minimum, an annual phone call with their chapter relations manager to identify opportunities for support.

SELECT 2

- + **Member Communication:** Chapter communicates with its members about non-programming information. This can be included in a blog, vlog, newsletter, and so forth.
- + **Communication Strategy:** Chapter has a targeted communication strategy and plan (including social media) to communicate with chapter prospects and members.
- + **Virtual Member Benefits:** Chapter provides a member-only section through the chapter's website or social media platforms.
- + **Employee Learning Week (ELW):** Chapter participates in and promotes ELW.