2025 Chapter Affiliation Requirements (CARE) Submission Summary

2025 CARE Submission Summary

CHAPTERS REPORTING ON THE 2024 CALENDAR YEAR

2025 CARE SUBMISSION SUMMARY

If you have any questions regarding the 2025 CARE Submission Summary, please contact:
Bianca Clark, Senior Manager, Chapter Services, bclark@td.org
Jocalyn Lombardi, Project Manager, Chapter Services, jlombardi@td.org
Carly Buyantoqtokh, Chapter Relations Specialist, cbuyantoqkokh@td.org
Shruti Nallappa, Chapter Relations Specialist, snallappa@td.org

Section 1: Executive Summary

Submission Results

As of the CARE submission deadline date (January 31, 2025):
- 78 out of 81 active chapters (96%) completed the CARE submission process.
- 75 chapters (93%) achieved 100% in all elements. In 2024, 74 chapters achieved 100% in all elements.

Achievement Data

The 78 submitting chapters self-evaluated their percentage of achievement in all 6 CARE Foundational elements.

1. 100 Percent of Achievement

| Element	Element Description
Board of Directors	The chapter board meets at least once per quarter.
	Chapter board members maintain Power membership.
	The chapter maintains written descriptions for elected members.
	Chapter submits an incoming 2025 board roster using the Excel template.
Governance	The chapter's mission, vision, and bylaws align with those of ATD, and the chapter meets the ATD branding guidelines.
	The chapter complies with federal and state reporting requirements.
Finance	Chapter submits its most recent balance sheet and income statement through the survey submission site.
	Chapter submits the most recent income statement.
	Chapter submits yearly balance sheet.
Membership	The chapter board assesses its members' needs and satisfaction levels at least once per year.
Programming	
Communication	The chapter maintains a current website with up-to-date information.
	The chapter disseminates a communication piece to members at least once a quarter that includes chapter and ATD programs and initiatives.
	The chapter board shares the following information with members at least once per year: membership numbers, financial performance, and progress towards annual goals.
	Chapter met with ATD CRM.

2. Less Than 100 Percent of Achievement

Element	Element Description	Chapter % Achieved
Board of Directors		
Governance	The chapter members participate in the nomination and election of the chapter board.	97.4%
	Chapter submits operational plan	98.7%
Finance	The chapter board develops an annual operating budget and makes it available to members.	98.7%
	Chapter board has an internal or external financial review completed annually by a person or group not directly responsible for managing chapter finances.	97.4%
Membership	The chapter completes 10 activities of the chapter's choice.	97.4%
Programming	The chapter provides at least six professional development activities per year for members.	98.7%
Communication		

What Does the CARE Information Tell Us?

The 2025 CARE results for ATD's 81 active chapters were:

Chapter CARE Achievement
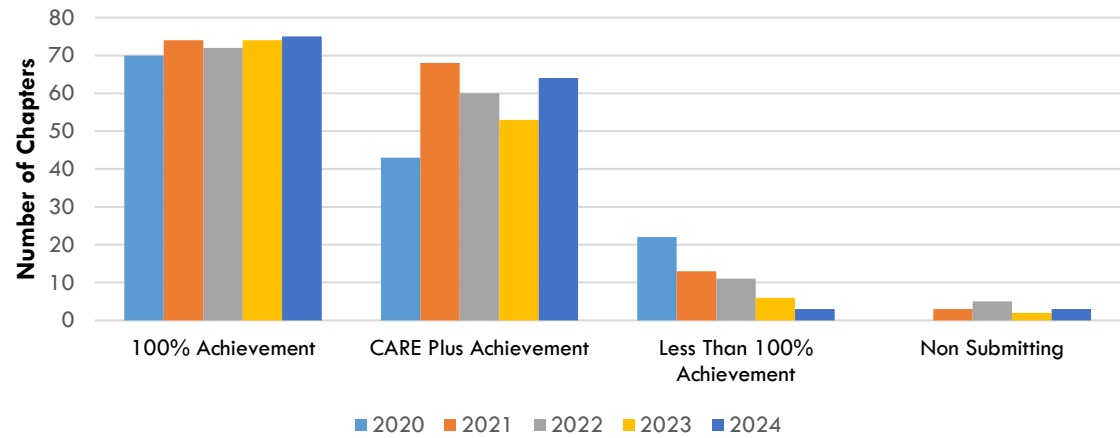
SECTION 2: CHAPTER RESULTS

As of the CARE submission deadline date (January 31, 2025):

- 78 out of 81 active chapters (96%) completed the CARE submission process.
- 75 (93%) achieved 100 percent.
- 64 (79%) achieved CARE Plus status.
- 3 chapters (4%) achieved less than 100 percent.
- 3 chapter (4%) did not submit.
- 1 chapter was inactive and was not required to complete the CARE survey.

Chapters That Achieved 100 Percent CARE, as of January 31, 2025:

Brazos Valley	Lake Superior	Sacramento
Capital Region	Memphis	Utah
Florida Suncoast	Mid New Jersey	Vermont
Kentuckiana	Northeast Wisconsin	

Chapters That Achieved 100 Percent CARE and CARE Plus, as of January 31, 2025:

Ann Arbor	Greater Atlanta	North Dakota
Appalachia	Greater Boston	Northeast Florida
Arizona	Greater Cincinnati	Northern New Jersey
Austin	Greater Cleveland	Orange County
Baton Rouge	Greater Las Vegas	Pittsburgh
Birmingham	Greater Philadelphia	Puget Sound
Buffalo Niagara	Greater Richmond	Research Triangle Area
Cascadia	Greater Toledo	Rhode Island
Central Florida	Greater Twin Cities	Rochester
Central Indiana	Hawaii	Rocky Mountain
Central Iowa	Hawkeye	San Antonio
Central Massachusetts	Houston	San Diego
Central New York	Kansas City	Smoky Mountain
Central Ohio	Long Island	South Carolina
Central Oklahoma	Los Angeles	South Florida
Central Pennsylvania	Madison Area	Southeastern Wisconsin
Charlotte	Maine	Southern Connecticut
Chicagoland	Maryland	St. Louis
Cuyahoga Valley	Metro DC	Tulsa
Dallas	Nashville	West Michigan
Detroit	Nebraska	
Fort Worth/Mid-Cities	New York City	

Chapters That Did Not Achieve 100 Percent CARE, as of January 31, 2025:

Mississippi	Mississippi Valley	Puerto Rico

Active Chapters That Did Not Submit a CARE Submission, as of January 31, 2025

Golden Gate	New Mexico	Southeastern Virginia

Inactive Chapters, as of January 31, 2025:

New Orleans

SECTION 3: ANNUAL UPDATE INFORMATION

BOARD OF DIRECTORS

When are your chapter board meetings typically held? (n=78)

	Count	Percentage of Sample Answered
Monthly	70	89.7%
Bimonthly (occurring every two months)	2	2.6%
Quarterly	1	1.3%
Other	5	6.4%

Does your chapter pay for ATD membership dues for one or more chapter board members? (n=)

	Count	Percentage of Sample Answered
Yes	49	62.8%
No	29	37.2%

When do your incoming board members **officially** begin their terms? (n=78)

	Count	Percentage of Sample Answered
First quarter (January through March)	67	85.9%
Second quarter (April through June)	0	
Third quarter (July through September)	8	10.3%
Fourth quarter (October through December)	3	3.8%

GOVERNANCE

What types of insurance coverage does your chapter have? Select all that apply. (n=78)

	Count	Percentage of Sample Answered
Directors' and officers' liability insurance	51	65.4%
Event-based insurance coverage	9	11.5%
General liability	45	57.7%
Professional liability	4	5.1%
None	9	11.5%

Is your chapter incorporated? (n=78)

	Count	Percentage of Sample Answered
Yes	65	83.3%
No	13%	16.7%

FINANCE

Does your chapter pay for any administration help, such as a management firm or other administrative service? (n=78)

	Count	Percentage of Sample Answered
Yes	29	37.2%
No	49	62.8%

MEMBERSHIP

What was your chapter's average membership number for 2024? (n=77)

	Count	Percentage of Sample Answered
0–49	12	15.6%
50–99	26	33.8%
100–149	10	13.0%
150–199	11	14.3%
200–249	5	6.5%
250–299	5	6.5%
300+	6	7.8%
Mean = 137.36		

Did your chapter raise dues in 2024? (n=78)

	Count	Percentage of Sample Answered
Yes	8	10.3%
No	70	89.7%

Did your chapter lower dues in 2024? (n=78)

	Count	Percentage of Sample Answered
Yes	0	
No	78	100%

Does your chapter plan to raise dues in 2025? (n=78)

	Count	Percentage of Sample Answered
Yes	7	9.0%
No	71	91.0%

How much are your regular membership dues? (n=78)

	Count	Percentage of Sample Answered
$25–49	1	1.3%
$50–74	28	35.9%
$75–99	28	35.9%
$100–124	4	5.1%
$125–149	12	15.4%
$150 or more	5	6.4%
Mean = $86.56		

Which of these dues categories does your chapter have? (n=77)

	Count	Percentage of Sample Answered
Group/corporate membership	58	75.3%
Senior member	13	16.9%
Student member	72	93.5%
Young professional	8	10.4%
Other	30	39.0%

How much are your **group or corporate** member dues (per person)? (n=57)

	Count	Percentage of Sample Answered
$25–49	5	8.8%
$50–74	16	28.1%
$75–99	13	22.8%
$100–124	9	15.8%
$125–149	7	12.3%
$150 or more	7	12.3%
Mean = $103.67		

How much are your **senior** membership dues? (n=13)

	Count	Percentage of Sample Answered
$0–24	2	15.4%
$25–49	4	30.8%
$50–74	5	38.5%
$75–99	2	15.4%
Mean = $46.54		

How much are your **student** membership dues? (n=71)

	Count	Percentage of Sample Answered
$0–24	10	14.1%
$25–49	39	54.9%
$50–74	17	23.9%
$75–99	4	5.6%
$100 or more	1	1.4%
Mean = $37.51		

How many student members does your chapter have? (n=72)

	Count	Percentage of Sample Answered
Have a student rate but no student members	9	12.5%
1–9	48	66.7%
10–19	8	11.1%
20–29	1	1.4%
30 or more	2	2.8%
Mean = 6 students		

Which of these are requirements for a student to get the student membership rate? (n=72)

	Count	Percentage of Sample Answered
Attend an accredited university or college	58	80.6%
Demonstrate they are taking classes in a talent development-related field	16	22.2%
Demonstrate they are in a degree program in a talent development-related field	11	15.3%
Take a minimum number of credit hours	14	19.4%
Some other criteria	10	13.9%

How much are your **young professional** dues? (n=8)

	Count	Percentage of Sample Answered
$0-24	1	12.5%
$25–49	3	37.5%
$50–74	1	12.5%
$75–99	3	37.5%
Mean = $57.25		

Does your chapter provide ATD members a discount on chapter membership? (n=78)

	Count	Percentage of Sample Answered
Yes	26	33.3%
No	52	66.7%

What is the percentage of your discount? (n=16)

	Count	Percentage of Sample Answered
1–9	1	6.3%
10–19	6	37.5%
20–29	4	25.0%
30 or more	5	31.3%

PROGRAMMING

When are most of your regular programs held? Select all that apply. (n=78)

	Count	Percentage of Sample Answered
Morning	28	35.9%
Lunchtime	43	55.1%
Afternoon	12	15.4%
Evening	42	53.8%
Other	9	11.5%

What is the average number of people at your regular monthly chapter meeting? (n=74)

	Count	Percentage of Sample Answered
0–19	39	53.1%
20–39	30	40.8%
40–59	4	5.5%
60 or more	1	1.4%
Mean = 21 People		

What is the approximate registration fee for a **chapter member** to attend a chapter program? (n=76)

	Count	Percentage of Sample Answered
Free	36	47.4%
$1–9	1	1.3%
$10–19	13	17.1%
$20–29	14	18.4%
$30 or more	12	15.8%
Mean = $11.38		

What is the approximate registration fee for a **nonmember** to attend a chapter program? (n=76)

	Count	Percentage of Sample Answered
Free	5	6.6%
$1–9	1	1.3%
$10–19	17	22.3%
$20–29	23	30.3%
$30–39	13	17.1%
$40 or more	17	22.3%
Mean = $25.03		

What is the registration fee for a **chapter member** to attend a chapter-sponsored conference? (n=54)

	Count	Percentage of Sample Answered
Free	10	18.5%
$1–49	9	16.9%
$50–99	7	13.1%
$100–149	5	9.5%
$150–199	13	24.3%
$200 or more	10	18.7%
Mean = $111.20		

What is the registration fee for a **nonmember** to attend a chapter-sponsored conference? (n=51)

	Count	Percentage of Sample Answered
Free	5	9.8%
$1–49	7	13.8%
$50–99	6	11.9%
$100–149	5	9.9%
$150–199	8	15.8%
$200–249	6	11.9%
$250 or more	14	27.7%
Mean = $156.78		

COMMUNICATION

Which of the following social media channels does your chapter have? (n=78)

	Count	Percentage of Sample Answered
Facebook	49	62.8%
Instagram	25	32.1%
LinkedIn group	77	98.7%
Twitter	18	23.1%
YouTube	20	25.6%
Blog	8	10.3%
Other	13	16.7%

SECTION 4: FOUNDATIONAL ELEMENTS ACHIEVEMENT DATA

BOARD OF DIRECTORS

1.1   Chapter submits an incoming 2024 board roster using the Excel template. (n=78)

	Count	Percentage of Sample Answered
Achieved	78	100%
Nonachieved	0	

1.2   The chapter board meets at least once per quarter. (n=78)

	Count	Percentage of Sample Answered
Achieved	78	100%
Nonachieved	0	

1.3   Chapter board members maintain Power Membership (joint chapter/ATD national membership). (n=78)

	Count	Percentage of Sample Answered
Achieved	78	100%
Nonachieved	0	

1.4   Chapter maintains written position descriptions for elected members. (n=78)

	Count	Percentage of Sample Answered
Achieved	78	100%
Nonachieved	0	

GOVERNANCE

2.1   The chapter's mission, vision, and bylaws align with those of ATD, and the chapter meets the ATD branding guidelines. (n=78)

	Count	Percentage of Sample Answered
Achieved	78	100%
Nonachieved	0	

2.2   The chapter complies with federal and state reporting requirements. (n=78)

	Count	Percentage of Sample Answered
Achieved	78	100%
Nonachieved	0	

2.3   The chapter members participate in the nomination and election of the chapter board. (n=78)

	Count	Percentage of Sample Answered
Achieved	76	97.4%
Nonachieved	2	2.6%

2.4   The chapter submitted an operational plan. (n=78)

	Count	Percentage of Sample Answered
Achieved	77	98.7%
Nonachieved	1	1.3%

FINANCE

3.1   Chapter must upload its most recent balance sheet and income statement through the survey submission site by January 31, 2025. (n=78)

	Count	Percentage of Sample Answered
Achieved	78	100%
Nonachieved	0	

3.2   The chapter board develops and approves an annual operating budget and makes it available to members. (n=78)

	Count	Percentage of Sample Answered
Achieved	77	98.7
Nonachieved	1	1.3%

3.3   Chapter board has an internal or external financial review completed annually by a person or group not directly responsible for managing chapter finances. (n=78)

	Count	Percentage of Sample Answered
Achieved	76	97.4%
Nonachieved	2	2.6%

3.4   Chapter submitted most recent income statement. (n=78)

	Count	Percentage of Sample Answered
Achieved	78	100%
Nonachieved	0	

3.5   Chapter submitted most recent balance sheet. (n=78)

	Count	Percentage of Sample Answered
Achieved	78	100%
Nonachieved	0	

MEMBERSHIP

4.1   The chapter board assesses its members' needs and satisfaction levels at least once per year. (n=78)

	Count	Percentage of Sample Answered
Achieved	78	100%
Nonachieved	0	

4.2   The chapter completes 10 joint membership activities of the chapter's choice. (n=78)

	Count	Percentage of Sample Answered
Achieved	76	97.4%
Nonachieved	2	2.6%

PROGRAMMING

5.1   The chapter provides members with at least six professional development activities per year. (n=78)

	Count	Percentage of Sample Answered
Achieved	71	98.7%
Nonachieved	1	1.3%

COMMUNICATION

6.1   The chapter maintains a current website with up-to-date information. (n=78)

	Count	Percentage of Sample Answered
Achieved	78	100%
Nonachieved	0	

6.2   The chapter disseminates a communication piece to members at least once a quarter, including chapter and ATD programs and initiatives. (n=78)

	Count	Percentage of Sample Answered
Achieved	78	100%
Nonachieved	0	

6.3   At least once per year, the chapter board shares information about membership numbers, financial performance, and progress toward annual goals with members. (n=78)

	Count	Percentage of Sample Answered
Achieved	78	100%
Nonachieved	0	

6.4   Chapter met with ATD CRM. (n=78)

	Count	Percentage of Sample Answered
Achieved	78	100%
Nonachieved	0	

SECTION 5: CARE PLUS ELEMENTS ACHIEVEMENT DATA

BOARD OF DIRECTORS

1.1   The chapter provides a defined orientation/onboarding process for incoming board members. (n=77)

	Count	Percentage of Sample Answered
True	74	96.1%
False	3	3.9%

How is the board member onboarding delivered? Select all that apply. (n=74)

	Count	Percentage of Sample Answered
Hybrid	37	50%
In-person	26	35.1%
Virtually	28	51.4%

Approximately what is the frequency of your board member onboarding? (n=74)

	Count	Percentage of Sample Answered
Annually	32	43.2%
As needed	42	56.8%
Monthly	0	
Quarterly	0	

In what month(s) does the board member onboarding occur? (n=74)

	Count	Percentage of Sample Answered
January	46	62.2%
February	15	20.3%
March	9	12.2%
April	7	9.5%
May	10	13.5%
June	10	13.5%
July	17	23.0%
August	11	14.9%
September	12	16.2%
October	19	25.7%
November	26	35.1%
December	42	56.8%

What kind of coaching/mentoring does the chapter provide board members? (n=74)

	Count	Percentage of Sample Answered
Board meetings, strategy session, and/or board retreat has time dedicated to board member coaching/mentoring.	65	87.8%
New board members shadow and/or attend board meetings prior to the start of their term.	57	77.0%
Onboarding materials made available to incoming positions	59	79.7%
Outgoing position mentors incoming position.	63	85.1%
President one-on-one	63	85.1%
President team (president, president-elect, past president)	46	62.2%
Other	4	5.4%

If "Other," briefly explain what type of coaching/mentoring does the chapter provide?
- The President, The Director of Finance and the Business Manager coordinate onboarding
- Schedule check-ins throughout the year as needed. Provide a seasoned board "buddy" not on their team to help when needed.
- President provides ongoing 1:1 sessions with board members for sharing information, helping to develop goals and objectives, and understanding the chapter's history, activities, and decisions. Board members are encouraged to collaborate with each other on projects, activities, and goals.
- Our Chapter Admin participates as well

Who leads the onboarding of new board member(s)? Select all that apply. (n=74)

	Count	Percentage of Sample Answered
Board member role dedicated to onboarding	10	13.5%
President	57	77.0%
Role predecessor	53	71.6%
Other	14	18.9%

If "Other," briefly explain who is leading the onboarding of new board member(s):
- Whomever is familiar with role or has performed in past.
- The President, The Director of Finance and the Business Manager coordinate onboarding
- The chapter's President-elect facilitates new board onboarding in November as the existing board members wrap up the year and transition new board members into their upcoming roles. This 2-month time period allows new board members to acclimate to their roles and shadow outgoing board members to ensure smooth transition and transfer of knowledge.
- President-Elect supports onboarding as needed
- Pres-Elect

- Our manager of operations role leads onboarding efforts. This role is responsible for setting up access to our technical resources, and helps connect new board members to their peers, outgoing people in their role, and reporting structure.
- Other board members other than role predecessor also provide additional mentoring and training.
- Onboarding is generally led by the current President, but role-specific onboarding / coaching is provided by immediate predecessor or legacy board member who has held role in question. Past Presidents also participate as resources for new board members.
- New board members meet with all of the current board to learn the roles and how they work together.
- Managing Director
- Incoming President
- Executive Committee
- Board Admin, VP of TechOps
- Assigned board buddy

1.2   The chapter has a succession strategy for identifying and filling board member positions. (n=76)

	Count	Percentage of Sample Answered
True	67	88.2%
False	9	11.8%

Describe the elements of your succession strategy. Select all that apply. (n=67)

	Count	Percentage of Sample Answered
Has a nominating committee responsible for selecting board members	27	40.3%
Has board member dedicated to identifying future board members	21	31.3%
Has multiple touchpoints with prospects to keep them engaged and informed	51	76.1%
Maintains an ongoing list of prospective board members detailing the fit for a specific role and the individual's skills/traits	34	50.7%
Offers opportunities to attend board meetings to educate prospective board members on board activities	52	77.6%
Other	14	20.9%

If "Other," briefly describe the actions in your succession strategy:
- We have had tremendous luck engaging members into committee positions and using that as a pipeline to electing them to a board seat.
- We have a Director of Volunteers who meets with new chapter members and determines if they would like to volunteer. Volunteers are given opportunities to become board committee members with the intention of leading to a future board position.
- We create volunteer opportunities for our regular meetings and identify those who fulfill those roles in a manner consistent with organizational values and encourage greater participation.

- Utilize our volunteers as prospective board members. All board members are responsible for nominating possible board members.
- Targeted recruitment of potential board members from among the current chapter membership- emails, invitations to come to specific meetings, etc.
- Robust use of social media, email. Also frequent board discussions as board members prepared to roll off the board.
- Offers Orientation programs that include encouraging leadership
- Have a 45-day trial period where prospective members attend 1-2 board meetings and an event, complete an application form, review a part 1 onboarding, and meet with 2 current board members.
- Each board member is asked to look for and recruit volunteers to succeed them.
- Dedicated webpage highlighting opportunities, Volunteer job descriptions , Volunteer marketing using the website, social media, and email
- Committee members typically become board members
- Board members actively identify prospects from their connections.
- Annual Open Board Meeting
- ● The President and Board will share information about volunteer opportunities and open board positions in chapter communications and will post on the website. All events will reserve time to announce opportunities. ● The Board will identify skills, talents and qualities needed on the Board and committees. They will look to fill gaps as well as broaden the roles as needed to meet chapter goals. ● Each VP will build a committee to participate in planning, innovation, and completion tasks. Time will be given to committee members by the VP's and other Board members to build their understanding of the organization and create a path to leadership roles. ● Board members will actively search for stand-out candidates throughout the year and inform the board of possible candidates for board and committee positions. VP's will encourage committee members to share ideas for candidates. ● All interested candidates will interview with the President and other Board members to gain a clear understanding of chapter activities and priorities. Current needs for certain talents and skills based on roles will be discussed and assessed with each candidate.

Does your chapter review its succession plan annually? (n=67)

	Count	Percentage of Sample Answered
Yes	60	89.6%
No	7	10.4%

1.3   The chapter has a volunteer recruitment strategy in place for positions supporting the board's work. (n=78)

	Count	Percentage of Sample Answered
True	69	88.5%
False	9	11.5%

The chapter volunteer recruitment strategy includes: (n=69)

	Count	Percentage of Sample Answered
Board is structured for succession planning	39	56.5%
Dedicated webpage highlighting opportunities	38	55.1%
Position dedicated to coordinating chapter volunteers	27	39.1%
Targeted outreach to prospective volunteers	49	71.0%
Volunteer job descriptions	39	56.5%
Volunteer marketing using the website, social media, and email	50	72.5%
Volunteer open house	11	15.9%
Volunteer recruitment goal included in annual goals and strategies	25	36.2%
Other	13	18.8%

If "Other," describe the elements of your recruitment strategy:
- We have subcommittees with volunteer members that help with the work for certain board positions they often are a pipeline for a future board seat.
- We have a section of our website for volunteer roles.
- We continue to share what we do at every meeting and share we are always open to volunteers whether project-based or for a full-term.
- Volunteer survey sent to ATD mailing list.
- Volunteer recruitment through monthly networking sessions and chapter newsletter.
- Volunteer marketing at events, both webinars and in-person.
- There is targeted volunteer recruiting conducted by board members to 1) support their efforts (this recruiting effort is supported by the total board) and 2) identification of individuals who might become future board members or past board members who might want to increase their engagement with the chapter.
- The past president and president elect positions help ensure leadership continuity. Each VP can identify potential board successors from within their individual committees.
- Succession Planning Strategy: * To recruit 5 new volunteers for the chapter by the end of the year. - Each month, the President-Elect will compile a list of chapter members who have attended two+ events in the last 60 days. This list will be shared monthly with a different board member who will be charged with approaching that person at a chapter event to inquire about their interest in volunteering for the chapter. The VP of Marketing and Communications will also advertise volunteer positions during monthly meetings, on social media, and in the quarterly newsletter. Goals: ● Update volunteer positions descriptions to include specific tasks separate from the board positions. ● Create volunteer onboarding process
- Our ATD Pittsburgh Chapter board members focus on recruiting individuals who are consistently involved in our events and activities, ensuring they are active participants in the chapter. This engagement allows us to identify potential volunteers who are already committed to the chapter's mission. In addition to personal outreach, we make volunteer opportunities known by sharing them during chapter meetings and regularly featuring them in the President's blog. This approach helps ensure that all members have the chance to contribute and become more involved in the chapter's growth and success.

- Highlighted volunteer opportunities in the newsletter multiple times.
- At each Chapter Board Meeting we discuss Membership and Volunteer needs, create action plans, and identify specific members to contact for Volunteer Opportunities. At each Chapter Event we announce Volunteer Opportunities. At each Chapter Event we recognize Volunteers for time, talent, and resources given to the Chapter. We also highlight available Chapter Board Positions and Volunteer opportunities in the Quarterly Newsletter.
- "Get Involved" webinars conducted

1.4   At least one board member (excluding paid administrators) attends a NAC area call. (n=76)

	Count	Percentage of Sample Answered
True	73	96.1%
False	3	3.9%

1.5   The chapter had board member(s) attend ATD Chapter Leaders Conference (ALC). (n=78)

	Count	Percentage of Sample Answered
True	61	78.2%
False	17	21.8%

1.6   The chapter has an advisory board or council that involves past presidents in chapter activities. (n=78)

	Count	Percentage of Sample Answered
True	44	56.4%
False	34	43.6%

1.7   The chapter board meets to plan for the future strategically. (n=77)

	Count	Percentage of Sample Answered
True	73	94.8%
False	4	5.2%

1.8   The chapter board submitted a best practice to the SOS program in the past year. (n=77)

	Count	Percentage of Sample Answered
True	26	33.8%
False	51	66.2%

GOVERNANCE

2.1   The chapter board maintains and updates its standard operating procedures (SOPs) annually or as needed throughout the year. (n=77)

	Count	Percentage of Sample Answered
True	65	84.4%
False	12	15.6%

Which of the following does your SOPs include? (n=64)

	Count	Percentage of Sample Answered
CARE requirements	51	79.7%
Chapter background	25	39.1%
Conflict of interest policy	30	46.9%
Election of officers	51	79.7%
Job descriptions	59	92.2%
Mission and vision	55	85.9%
Organizational chart	26	40.6%
Past presidents	32	50.0%
Policies and procedures	51	79.7%
Strategic goals	46	71.9%
Other	13	20.3%

Please explain any additional items included in your chapter's SOPs:

- We refer to our Standard Operating Procedures as the "Board Handbook." This guide serves as a key resource for current and incoming board members. It includes several important documents and tools to ensure smooth operations and continuity within the chapter: 1. Three-Year Officer Roster – A list of officers who have served on the board over the past three years, providing a historical overview of leadership transitions. 2. Chapter Board Planning Calendar – A detailed calendar that outlines key dates, events, and activities for the board throughout the year to help with strategic planning and timely execution. 3. New Board Member Onboarding Procedures – A step-by-step guide to orient new board members, ensuring they understand their roles, responsibilities, and the chapter's goals. 4. Systems and Software Information – Details about the digital tools and platforms used by the chapter and board for communication, event management, data tracking, and other administrative functions. 5. Chapter Operational Plan for the Last Three Years – A summary of the chapter's strategic goals and initiatives over the past three years, providing insights into the chapter's progress and direction. 6. Chapter By-Laws – The governing rules and regulations that outline the structure, responsibilities, and decision-making processes within the chapter. Our Board Handbook helps to guide board activities, ensure consistency, and provide a reference for maintaining the chapter's effectiveness and mission alignment.
- SOP for running our Peer Mentoring programming SOP for balancing the financial each month
- SOP also includes: Chapter Financial Review, Succession Planning Strategy, and Chapter Professional Development.
- photo policy sponsor SOPs registration/cancelation policy event cancelation policy membership creation policy credit card usage policy raffle policy
- Finance Review, Membership, Amendment and modifications
- Finance monthly reconciliation SOP Year-end finance review SOP Membership process SOP
- Event Prep and Delivery Wild Apricot Maintenance
- Each of our VP's create an action plan that includes SOP data. This creates a blueprint and a work plan for the current year and the following year.
- Chapter Membership, Fiduciary Responsibility, ATD Events and Promotions, National Resources, Administrative Aspects of the Chapter, Volunteer Experience
- Bylaw review & Financial review
- Board operations, Governance, Programs, Communication Processes, Chapter Membership, finances, National information and Administrative processes & procedures

- Board development and transition, strategic planning, board meetings, membership levels
- Adding Members in Wild Apricot Editing the ATD STL Website via Wild Apricot Onboarding new chapter members Event Registration Process in Wild Apricot Using Google Drive for file Management Installation of Officers

2.2 The chapter board reviews its bylaws annually, including a review of the bylaws as part of board member onboarding. (n=76)

	Count	Percentage of Sample Answered
True	65	85.5%
False	11	14.5%

2.3 The chapter makes board meeting minutes/summaries available to members. (n=78)

	Count	Percentage of Sample Answered
True	70	89.7%
False	8	10.3%

How are board meeting minutes/summaries made available to members? (n=68)

	Count	Percentage of Sample Answered
Emailed upon request	38	55.9%
Included in newsletter	1	1.5%
Posted on member-only website	38	55.9%
Posted publicly on website	8	11.8%
Other	6	8.8%

2.4 The board maintains a central repository or document library for archiving important chapter documents. (n=78)

	Count	Percentage of Sample Answered
True	78	100%
False	0	

What system does the chapter use as a central repository or document library for archiving important documents? (n=78)

	Count	Percentage of Sample Answered
Basecamp	3	3.8%
Choice Box	2	2.6%
Dropbox	8	10.3%
Google Drive	66	84.6%
SharePoint	2	2.6%
Wild Apricot	42	53.8%
OneDrive	0	
Other	7	9.0%

Please list any alternate platforms your chapter is using for documents:

- Asana
- Bizstudio
- Hard drive
- Slack
- StarChapter
- Hinztime

FINANCE

3.1   The chapter has approximately three to six months of operating expenses set aside. (n=77)

	Count	Percentage of Sample Answered
True	74	96.1%
False	3	3.9%

3.2   The chapter board completes a risk assessment and reviews it annually. (n=77)

	Count	Percentage of Sample Answered
True	44	57.1%
False	33	42.9%

3.3   The chapter budgets to send board members to the ATD Chapter Leaders Conference (ALC) and/or covers the cost of ATD membership. (n=77)

	Count	Percentage of Sample Answered
True	65	84.4%
False	12	15.6%

How many chapter leaders are budgeted to attend ALC in 2024? (n=64)

	Count	Percentage of Sample Answered
0	4	6.9%
1	10	17.2%
2	17	29.3%
3	8	13.8%
4	3	5.2%
5	5	8.6%
6+	11	19.0%

3.4   The chapter's partnership strategy identifies, recruits, and maintains partnerships to support chapter programming and operations. (n=76)

	Count	Percentage of Sample Answered
True	61	80.3%
False	15	19.7%

If "True," please select the type of partner(s) the chapter works with. (n=60)

	Count	Percentage of Sample Answered
Other ATD chapter(s)	44	73.3%
Higher education	27	45.0%
Content provider/LMS	15	25.0%
Other professional association(s)	36	60.0%
Business(s) or nonprofits(s)	40	66.7%
Other	2	3.3%

3.5   The chapter has sponsors to support chapter programming and operations. (n=77)

	Count	Percentage of Sample Answered
True	60	77.9%
False	17	22.1%

If "True," please select the type of sponsor(s) the chapter works with. (n=58)

	Count	Percentage of Sample Answered
Local business(s)	44	75.9%
Higher education	26	44.8%
Learning/consulting agency	31	53.4%
Content provider/LMS	20	34.5%
Other	7	12.1%

MEMBERSHIP

4.1   The chapter has a member/volunteer recognition or spotlight program. (n=77)

	Count	Percentage of Sample Answered
True	58	75.3%
False	19	24.7%

How does the chapter provide recognition? (n=57)

	Count	Percentage of Sample Answered
Hosts an appreciation event	27	47.4%
Provides an award or gift	30	52.6%
Recognizes at in-person event	37	64.9%
Recognize in chapter newsletter	22	38.6%
Spotlights on the chapter website and/or social media	39	68.4%
Other	9	15.8%

If "Other," describe the ways the chapter provides recognition:
- We host a Year-end event for our SIG Leaders each year. We also recognize our volunteers at our conference
- We have a section of the member appreciation evening dedicated to recognizing and awarding our volunteers.
- Recognizes membership anniversaries during chapter meetings
- Recognize at chapter meetings and Award Dinner Virtual volunteer appreciation event
- Recognition of new, renewal members, and volunteers is conducted at the beginning of Chapter Events (In-Person and Remote).
- Quarterly drawing for membership, ATD Educational Partnership certificate
- President's quarterly blog on chapter website recognized volunteers on each posting.
- Digital Certificate
- 75th anniversary recognition of past presidents and continued volunteer contributions.

4.2   The chapter offers a job board, consultant referral service, resume workshop, or other service(s) not included in your chapter's member benefits. (n=76)

	Count	Percentage of Sample Answered
True	59	77.6%
False	17	22.4%

What service does your chapter offer? (n=59)

	Count	Percentage of Sample Answered
Consultant referral services	13	22.0%
Job board	56	94.9%
Resume review workshop	8	13.6%
Other	6	10.2%

If "Other," please list the services your chapter offers:
- We start every event and meeting with an "Open Opportunities" platform. People looking for an opportunity (job, mentorship, etc) can speak to what opportunities they are looking for and anyone who knows of an open role (like for our board or a job, etc.) can share the details of the opening.
- We encourage the use of Slack to post opportunities
- Mentorship program Consultants "Mastermind" program
- Mentor/Mentee program, and LinkedIn profile review, SIGs, COPs,
- Job seeker Rate and Transitioning into L&D Series
- Careeer Boost Coffee Chat once monthly

4.3   The chapter hosts an orientation for new members. (n=78)

	Count	Percentage of Sample Answered
True	58	74.4%
False	20	25.6%

How is the new member onboarding delivered? (n=57)

	Count	Percentage of Sample Answered
In-person	10	17.5%
Virtual	52	91.2%
Hybrid	4	7.0%

What is the program frequency? (n=57)

	Count	Percentage of Sample Answered
Annually	0	
Monthly	7	12.3%
Quarterly	11	19.3%
Twice a year	3	5.3%
On-demand	28	49.1%
Other	8	14.0%

If "other," please explain:
- We held 1 in 2024 and the plan is to have them at least quarterly in 2025
- This was started at the end of 2024 and self- paced online

- This is in combination with a new or prospective member meet and greet.
- Prior to every chapter program, which is typically every other month.
- Not quite quarterly
- In 2024, the program was quarterly with a shift to monthly in 2025
- Every other month
- Bi-MonthlyEvery chapter meeting - typically every other month / twice a quarter
- Began as monthly and transitioned to bi-monthly

What content is included in the onboarding? (n=57)

	Count	Percentage of Sample Answered
ATD overview	53	93.0%
Chapter background	52	91.2%
Member benefits	56	98.2%
Overview of events	55	96.5%
Power Membership	55	96.5%
Volunteer opportunities	55	96.5%
Other	9	15.8%

If "other," please describe additional onboarding content:
- Why they joined, their professional development goals, how our chapter can help
- Website navigation, intro to board members, discuss ATD ICE and chapter discounts
- Upcoming Events Ask how the member learned about the ATD Smoky Mountain Chapter. Discussion of ATD Capability Model and areas of interest/ need.
- Programming and Conference speaking opportunities
- Onboarding does focus on learning about the new member, their background, their interests, their ideas of what they wish to gain from being a member. We invite them to upcoming events and inform them about all volunteer and leadership opportunities. We discuss the information available via our website and LinkedIn group. We do a brief over view of our chapter organization and link to National.
- Networking opportunities within Chapter Member Resources (events and Slack community) ATD Education in-person events in Phoenix
- Member Spotlight, Sponsors/Resources
- Introductions and ice breaker
- Have a tenured member attend to answer questions

4.4 The chapter tracks the retention rate of its members and determines a target retention rate to meet annually. (n=77)

	Count	Percentage of Sample Answered
True	47	61.0%
False	30	39.0%

4.3 The chapter makes its membership available on the ATD Store. (n=77)

	Count	Percentage of Sample Answered
True	77	100%
False	0	

4.4   The chapter creates awareness about volunteering for the chapter and open positions. (n=77)

	Count	Percentage of Sample Answered
True	77	100.0%
False	0	

Volunteer recruitment resources include: (n=77)

	Count	Percentage of Sample Answered
Announcements at chapter events	76	98.7%
Dedicated webpage with open volunteer positions	39	50.6%
Volunteer fair/event	4	5.2%
Volunteer job descriptions	34	44.2%
Volunteer marketing through social media and email	54	70.1%
Webinar	6	7.8%
Other	17	22.1%

4.5   The chapter achieves a joint chapter/ATD membership rate of 45 percent or higher while meeting the 20 joint member minimum. (n=74)

	Count	Percentage of Sample Answered
True	64	86.5%
False	16	13.5%

4.6   The chapter identifies those activities most impacting its joint membership rate. (n=76)

	Count	Percentage of Sample Answered
True	44	57.9%
False	32	42.1%

4.7   The chapter holds a membership campaign to recruit prospective members. (n=78)

	Count	Percentage of Sample Answered
True	52	66.7%
False	26	33.3%

PROGRAMMING

5.1   The chapter offers a mentoring program/initiative for its members. (n=77)

	Count	Percentage of Sample Answered
True	17	22.1%
False	60	77.9%

How long is your program?
- 8 weeks
- 4 months
- 5 months
- 6 months
- 6-12 months
- 10 months
- 1 year
- As needed
- Ongoing

How many mentees did you have? (n=14)

	Count	Percentage of Sample Answered
0	1	7.1%
1–4	1	7.1%
5–9	4	28.6%
10–14	3	21.4%
15–19	2	14.3%
20 or more	3	21.4%
Mean = 15 Mentees		

How many mentors did you have? (n=14)

	Count	Percentage of Sample Answered
0	1	7.1%
1–4	3	21.4%
5–9	6	42.9%
10–14	2	14.3%
15-19	1	7.1%
20 or more	1	7.1%
Mean = 10 Mentors		

5.2   The chapter uses the Talent Development Capability Model™ in program development. (n=77)

	Count	Percentage of Sample Answered
True	73	94.8%
False	4	5.2%

5.3   The chapter hosts MORE THAN six professional development events each year. (n=77)

	Count	Percentage of Sample Answered
True	73	94.8%
False	4	5.2%

How many networking events did the chapter hold in 2024? (n=67)

	Count	Percentage of Sample Answered
0	2	3.0%
1–4	43	64.2%
5–9	10	14.9%
10–14	8	11.9%
15–19	1	1.5%
20 or more	3	4.5%
Mean = 5.3 networking events		

How many special interest groups (SIG) events did the chapter hold in 2024? (n=67)

	Count	Percentage of Sample Answered
0	22	32.8%
1–4	13	19.4%
5–9	16	23.9%
10–14	4	6.0%
15–19	5	7.5%
20 or more	7	10.4%
Mean = 7.6 SIG events		

How many geographic interest groups (GIG) events did the chapter hold in 2024? (n=61)

	Count	Percentage of Sample Answered
0	53	86.9%
1–4	5	8.2%
5–9	3	4.9%
Mean = 0.5 GIG events		

How many webinar events did the chapter hold in 2024? (n=66)

	Count	Percentage of Sample Answered
0	6	9.1%
1–4	12	18.2%
5–9	23	34.8%
10–14	14	21.2%
15–19	2	3.0%
20 or more	9	13.6%
Mean = 9.7 Webinars		

5.4   The chapter hosts or partners with other chapters to host a conference for its members and prospects. (n=76)

	Count	Percentage of Sample Answered
True	35	46.1%
False	41	53.9%

What was your conference theme?

- THRIVE!
- The future of instructional design
- The different facets of the TD and L&D spaces
- Stories – Conference Title: "Stories to Success: Transform Your Journey"
- Southwest Learning Summit
- Professional Development Day
- Pivot to Success! Talent Development Trends and Insights
- Pivot to Success
- New England Area Conference (NEAC)
- Navigating Tomorrow Talent Development and Your Career
- Lifelong Learning: Thriving in a changing world
- Learning Summit
- Learning is Forever
- Learning Forward
- High Rollers of HR and LD - Mastering the Game of Talent Management and Development
- Future Readiness
- Exploring New Rhythms in Learning
- EmPower Talent
- Embrace Change, Empower Talent

- ElevatED! Revitalize & Thrive
- Cultivating Learning
- Cultivating Community & Connection
- Creating Tailwinds: Enabling Transformation

- Change Management
- Career Development
- Blueprint for Success
- 2nd Annual Pre-ATD24 Michigan Speakers Conference

How many people attended the conference? (n=27)

	Count	Percentage of Sample Answered
1–49	4	14.8%
50–99	7	25.9%
100–149	6	22.2%
150–199	5	18.5%
200 or more	4	14.8%
Mean = 132 people		

5.5 The chapter offers its study groups for the Associate Professional in Talent Development (APTD®) and/or Certified Professional in Talent Development (CPTD®). (n=77)

	Count	Percentage of Sample Answered
True	19	24.7%
False	58	75.3%

What type of study group does the chapter offer? (n=18)

	Count	Percentage of Sample Answered
APTD	3	16.7%
CPTD	17	94.4%

On average, how many APTD study groups did your chapter run in 2023? (n=3)

	Count	Percentage of Sample Answered
1	2	66.6%
2	1	33.4%
Mean = 1.3 study groups		

What is the average number of participants per APTD study group? (n=3)

	Count	Percentage of Sample Answered
1–4	2	66.6%
5–9	1	33.4%
Mean = 4 participants		

On average, how many CPTD study groups did your chapter run in 2023? (n=16)

	Count	Percentage of Sample Answered
0	3	18.8%
1	3	18.8%
2	10	62.5%
Mean = 1.4 study groups		

What is the average number of participants per CPTD study group? (n=17)

	Count	Percentage of Sample Answered
0	3	17.6%
1–4	4	23.5%
5–9	4	23.5%
10 or more	6	35.3%
Mean = 6 participants		

5.6 The chapter hosts its own awards program (n=75)

	Count	Percentage of Sample Answered
True	20	26.7%
False	55	73.3%

What awards categories do you provide? (n=18)

	Count	Percentage of Sample Answered
Company	7	38.9%
Consulting	3	16.7%
Individual	13	72.2%
Professional Achievement	8	44.4%
Nonprofits	3	16.7%
Work teams	2	11.1%
Other	8	44.4%

If "Other," please list the categories of the chapter's awards program:
- Offered a workbook to members to fill out insights from meetings. There was a grand prize of a ATD National Certificate Program, drawn at random.
- Instructional Design: Trailblazer of the Year ELW Ultimate Learning Champion
- Influencer of the Year
- Exceptional Contribution and Lifetime Achievement
- Coaching & Mentoring Integrated Talent Management Learning & Development Learning Technologies Performance Improvement Small/Medium Organization Mentor Visionary
- Chapter Service Awards
- Awards are presented to organizations in 9 categories: 1. Career and Leadership Growth 2. Talent Strategy and Management 3. Culture Awareness and Inclusion 4. Performance Improvement 5. Change Management 6. Learning Impact through Analytics 7. Learning Design and Delivery 8. Knowledge Management 9. Technology Applications
- Innovator - Leader - Emerging Professional – Volunteer

5.7 The chapter collaborates with other chapters to plan and host joint programming. (n=75)

	Count	Percentage of Sample Answered
True	40	53.3%
False	35	46.7%

COMMUNICATION

6.1 The chapter communicates with its membership about non-programming information. (n=77)

	Count	Percentage of Sample Answered
True	67	87.0%
False	10	13.0%

What does the chapter use? (n=67)

	Count	Percentage of Sample Answered
Blog	6	9.0%
Email	58	86.6%
Facebook	35	52.2%
Instagram	17	25.4%
LinkedIn group	65	97.0%
Newsletter	46	68.7%
Twitter	6	9.0%
YouTube	13	19.4%
Video Blog	1	1.5%
Slack	8	11.9%
Other	10	14.9%

What "other" communication tools does the chapter use?
- WhatsApp
- Website
- Video post
- Podcast
- LinkedIn page

6.2 The chapter has a targeted communication strategy and plan (including social media) to communicate with chapter prospects and members. (n=76)

	Count	Percentage of Sample Answered
True	70	92.1%
False	6	7.9%

6.3 The chapter provides a member-only section through the chapter's website or social media. (n=78)

	Count	Percentage of Sample Answered
True	73	93.6%
False	5	6.4%

Select the information provided behind the member gateway or social media channels used. (n=72)

	Count	Percentage of Sample Answered
Board meeting minutes	48	66.7%
Event materials	51	70.8%
Governance documents	40	55.6%
Job board	39	54.2%
Member directory	56	77.8%
Mentoring	6	8.3%
Other	18	25.0%

6.4 The chapter participates in and promotes Employee Learning Week. (n=76)

	Count	Percentage of Sample Answered
True	49	64.5%
False	27	35.5%

What did your chapter do to support Employee Learning Week (ELW)? (n=49)

	Count	Percentage of Sample Answered
Hosted a themed event	20	40.8%
Hosted a webinar	12	24.5%
Organized a relevant communications plan	30	61.2%
Organized an awards program	2	4.1%
Received a state proclamation	4	8.2%
Other	15	30.6%

If "Other," please describe what your chapter did for ELW:
- We had a program the week of ELW and had a social media marketing campaign.
- We canceled the event because of lack of registration.
- Social media engagement opportunities throughout the week; shared local, upcoming learning opportunities in our region
- promoted on social media/ELW highlights
- Promoted on social media
- Promoted awareness through LinkedIn
- Members social that included several members companies highlighting their achievements
- LinkedIn Posts
- Hosted a week-long dialogue on LinkedIn on a variety of L&D topics.
- Highlighted on Main website header
- Email
- ELW contest
- Did a podcast interview for each day with board members and local TD professionals and launched on YouTube each day.
- Announced it
- Advertise and announce on social media