

ATD Chapter Leader Orientation and Onboarding

**Welcome to the ATD chapter leader
community!**

Who's in the room?





***Send questions in chat
throughout the webcast!***

Today's Session Team



Dana
Vogelmeier,
CPTD
National Advisor for
Chapters



Juliet Hart
National Advisor for
Chapters



Jenn Buckley,
CPTD
National Advisor for
Chapters



Sarah Schillen,
CPTD
National Advisor for
Chapters
Strategic Leadership
Committee Chair



Lisa Torreano,
PhD, CPTD
National Advisor for
Chapters



Jocalyn
Lombardi
Manager, Chapter
Relations
Western Area
ATD

Agenda

- Your Support Team
- Welcome to the Board – Now what?
- CARE
- Chapter Leader Community
- Development Opportunities
- Questions

Your Support Team

National Advisors for Chapters (NAC)

NAC can work with your chapter to...

- guide around Chapter Affiliation Requirements (CARE)
- support chapters with facilitating their annual board retreat
- find resources from ATD
- coach chapters about ATD initiatives
- share best practices
- advise ATD staff about issues of importance to chapters
- define future roles for chapters
- advocate for chapters to National
- ensure needs of chapters are recognized by ATD





Meet Kristine Ellis

*NAC Chair and
Member of the ATD
Board of Directors*

Meet Adam White

*Incoming NAC Chair
and Member of the ATD
Board of Directors*

January 2025 – December 2026



Chapter Services Team

Jocalyn Lombardi
Chapter Relations Manager –
Western Area
jlombardi@td.org



Bianca Clark
Chapter Services
Manager
bclark@td.org

Chasity Cook
Chapter Relations Manager –
Eastern Area
ccook@td.org



ATD Chapter Relations Manager Map

Have a question? Want more information? Call your ATD Chapter Relations Manager.



□ **Jocalyn Lombardi**
Chapter Relations Manager,
Western Area
jlombardi@td.org
703.683.8130

■ **Chasity Cook**
Chapter Relations Manager,
Eastern Area
ccook@td.org
703.683.5841





The screenshot shows the LinkedIn group page for 'ATD Chapter Leaders Group'. The header features the 'atd' logo and 'Association for Talent Development'. The group has 2,400 members, including Wendy Gates Corbett, MS, CPTD, and 164 other connections. A blue button labeled 'Invite connections' is visible. Below the header, there is a section to 'Start a post in this group' with options for Photo, Video, and Poll. The main content area shows a post by Linda Harris, M.S., AIC, 3rd+, Corporate Training Consultant, P&C Insurance Training Expert, 21h. The post is from 'Harris Training & Consulting', which has 11 followers. The post content is 'Building Camaraderie in your Virtual Team' and includes a video thumbnail showing a woman looking at a screen displaying a virtual meeting. On the right side, there is an 'About this group' section stating it is for ATD chapter leaders serving on their local chapter's leadership board. Below that is an 'Admins' section listing Samantha Herman (1st Owner, Lead Learning and Development Specialist, Strategy & Governance - Deloitte Leadership Academy), Bianca Clark (2nd Manager, Chapter Relations Manager, Eastern Area at Association for Talent Development (ATD)), and Lauren Abrahamson (1st Manager).

Board Volunteers & Chapter Basics

What is a Chapter?

- A. A non-profit organization
- B. An entity to run like a business
- C. A group of really amazing talent development professionals
- D. An opportunity to go rogue

**ANSWER:
A, B, & C!**

What is a Chapter?

An ATD chapter is a local, independent organization that is affiliated with ATD National.

Independence

- Chapters have their own governing boards and local operations.

Affiliation

- They are part of the ATD network, benefiting from its resources and brand.

Standards

- Chapters must adhere to ATD's guidelines to maintain quality and consistency.

Support

- ATD National provides resources and support to help chapters succeed.

What helps you run a Chapter?

- A. Chapter bylaws
- B. Local, state, and federal laws
- C. Incorporation requirements
- D. Chapter procedures
- E. ATD national affiliation

**ANSWER:
All the
Above!**

Board Service - What does it mean?

Serving on a Board means you agree to which of the following?

- A. Duty of Care
- B. Duty of Loyalty
- C. Call of Duty
- D. Duty of Obedience



You're a Board Member! Now What?

Three Main Responsibilities:



Care

- Be informed about the organization and make decisions based on research and sound judgment.



Loyalty

- Be committed to ensuring the organization's success and prioritize the organization's best interests over your own personal interests.



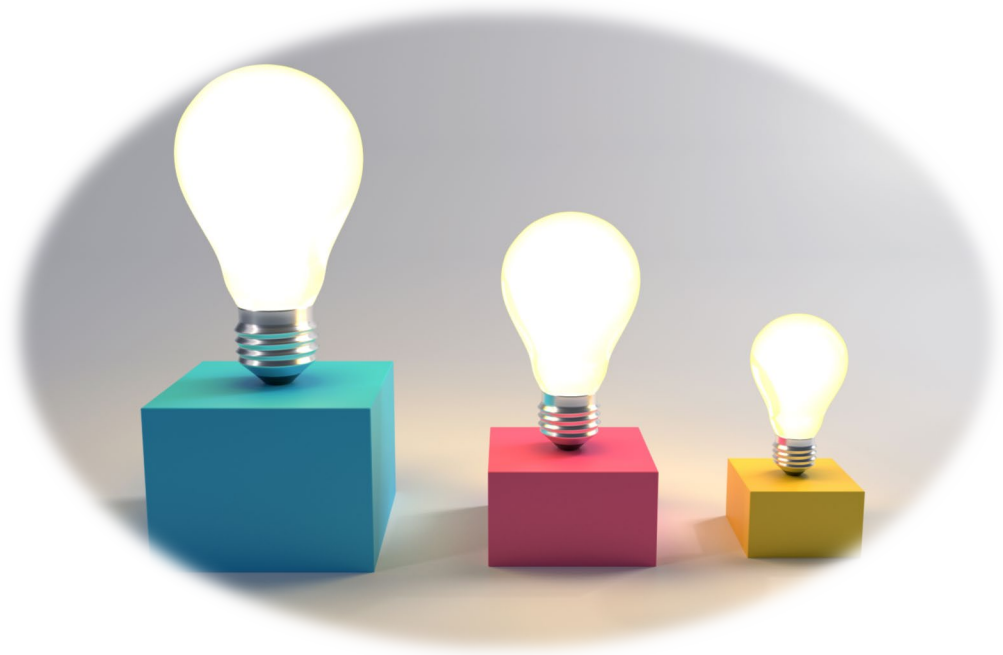
Obedience

- Follow the organization's rules, bylaws, and legal requirements.

Introducing CARE

Chapter Affiliation Requirements

CARE is...



“A set of performance guidelines to help chapters deliver consistent benefits to members.”



*Your **guiding light** to running your chapter as a **business***

CARE Breakdown



Board of Directors



Communication



Finance



Governance



Membership



Programming

CARE vs. CARE Plus



chapter affiliation requirements



chapter affiliation requirements

CARE Plus is a collection of strategies with a purpose is to:

- provide chapter leaders with recognition opportunities,
- a personalized road map to help identify gaps and strengthen chapter operations,
- flexibility for self-paced growth,
- formalized processes to address common chapter challenges,
- and a growth mindset.

CARE vs. CARE PLUS

CATEGORY

FOUNDATIONAL REQUIREMENTS

CARE PLUS

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.

CARE Resources

[Expand All](#)

2024 CARE Submission Summary (Reporting on the 2023 calendar year) +

CARE Workbook +

CARE Foundational and Plus Planning Tool +

CARE Foundational Requirements and CARE Plus Elements Quick List +

CARE Foundational Element Matrix +

CARE Plus Element Matrix +

Monthly CARE Tracker - Game of CARE +

Joint Membership Job Aid +

CARE 2023 Information and Planning Session +

Risk Assessment Guide +

Annual Report Template +

CARE Resources

Addendum Document Resources

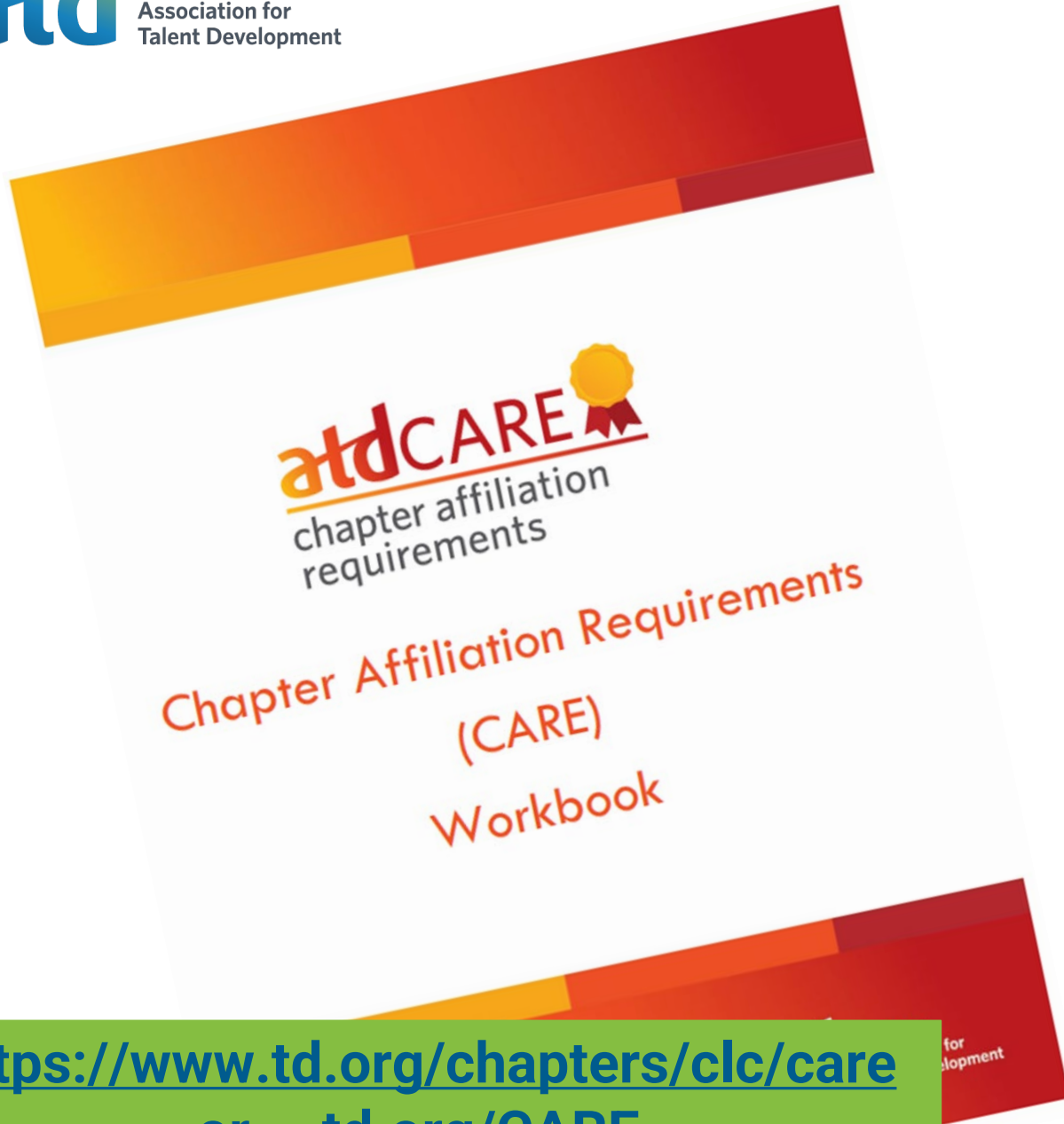
[Expand All](#)

CARE Membership Roster Template +

CARE Board Roster Template +

Chapter Operating Plan +

Most Recent Yearly Balance Sheet and Income Statement +



<https://www.td.org/chapters/clc/care>
or [td.org/CARE](https://www.td.org/CARE)

★ NAC Favorites



-Jennifer Stangl
NAC for New
England chapters

*"The **CARE Workbook** helps provide direction and guidance in planning and executing your strategy or annual activities. It serves as a tool to ensure the chapter has all aspects of CARE covered, and also supports prioritizing work to utilize board resources effectively and serve chapter needs."*

Chapter Leader Community

Chapter Leader Community (CLC)

Learn | Share | Succeed

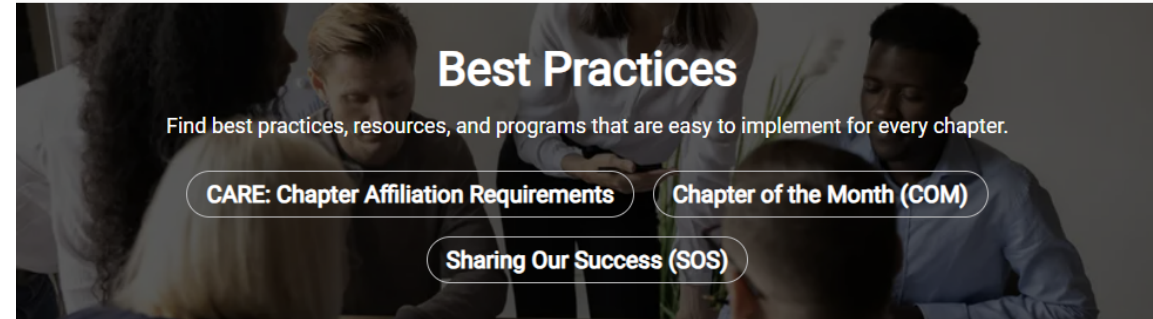
Find a topic quickly with the [short links map](#) or use the navigational sections below.
Questions, view the [chapter leader FAQs](#).

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.**

[Download the updated branding materials here.](#)

td.org/clc



[Administration](#) [Finance](#) [Membership](#) [Board Development](#) [Communications & Marketing](#) >

Learn how your chapter can succeed, inspire, and grow through strong chapter administration and leadership. Access essential chapter and board development tools to take your chapter to the next level.

- [ATD Education/Chapter Partnership Program](#)
Promote upcoming certificate programs and earn CHIP revenue. Chapters may also be eligible to receive a complimentary registration to local programs.
- [Wild Apricot Partnership](#)
A partnership with Wild Apricot is available to provide membership, website, and event management services to chapters at a discounted rate.
- [Toolkits](#)
Toolkits should be disseminated to chapter leaders responsible for that functional area throughout the year and when new information becomes available.


A Great Start: Onboarding Checklist

Additional Board Development Resources

TOPIC	DESCRIPTION
Business Acumen Development	This skill assessment is an opportunity for your chapter board to individually assess and get the specific abilities, knowledge, and behaviors that exemplify business acumen. In addition to the assessment, this provides a positive model of what your chapter should look for in a potential leader.
Chapter Finance Toolkit	Designed as a resource for a chapter finance officer, provides important information and advice on CFO responsibilities.
990 Filing Information	The guide provides information on filing a 990 or 990-N for the chapter.
Chapter Leader Onboarding Checklist	Review the Chapter Leader Onboarding Checklist to learn about the resources that will support success as a new chapter leader.

Chapter Leader Community (CLC)

Learn | Share | Succeed



CHAPTER LEADER ONBOARDING CHECKLIST

Get to Know Your National Advisor for Chapters (NAC) td.org/nac	Members of the NAC are distinguished chapter past presidents who serve as national volunteer advisors. Contact your chapter's NAC to share best practices and connect with leaders in your area on regularly scheduled calls.
Get to Know Your Chapter Relations Manager (CRM) td.org/crm	ATD's chapter services team is here to assist chapters and support their needs. Each chapter has a CRM who can answer your questions and share administrative, membership, and marketing guidance.
Watch the Chapter Leader Onboarding and Orientation Webcast td.org/chapter-webcast-search	Watch the onboarding webcast to learn what every chapter leader needs to know to get started. Members of the NAC and chapter services review helpful tools and resources in the Chapter Leader Community.
Visit the Chapter Leader Community (CLC) td.org/clc	Visit the Chapter Leader Community (CLC) to access tools and resources for effectively running your chapter.
Browse the Sharing Our Success (SOS) page td.org/sos	Visit the Sharing Our Success (SOS) page to learn about best practices from other chapters.

<https://www.td.org/chapters/clc/board-development>



NAC Favorites

*"ATD's **ChIP** program is a generous opportunity for chapters to capture revenue from member purchases made through the ATD store. It can be difficult to keep track of the details and nuances of this program, but this page does that for us!"*

Visit

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

Chapters receive a share of the revenue that they generate for national ATD programs and services.



-Sarah Schillen,
CPTD
NAC for Texas
Chapters

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](#).

*"I'm excited to have access to the '**Getting Started Leading Your ATD Chapter: First 90 Days**'. I'm confident that it will be an invaluable tool for new leaders, providing the guidance and support needed to hit the ground running and make a significant impact on their chapters."*

Visit

<https://www.td.org/chapters/clc/board-development>



-Gwen Navarrete
Klapperich, CPTD
NAC for Golden
Gate, Los Angeles,
Orange County,
Sacramento, San
Diego chapters

NEW Resource!

Additional Board Development Resources

TOPIC	DESCRIPTION
First 90 Days Chapter Leader Guide	This guide is intended to support your leadership journey to ensure chapter success.

Are you new to running a chapter?
This resource is for you! We have
created a checklist to help you get
organized and stay on track.

Getting Started Leading Your ATD Chapter: First 90 Days



Congratulations, and thank you for serving your ATD chapter! This guide is intended to support your leadership journey to ensure chapter success.

First 30 Days:

Running a chapter and learning the ins and outs can be overwhelming if you let it (or if you try to do it on your own). Leverage this list of suggested actions and resources to build a strong foundation as you get started. If you sail through the First 30 Days suggested actions, it is not too early to begin chipping away at the remaining suggestions for days 30–90 as outlined below.

Getting Started:

- Get the chapter logins and passwords to all accounts—update them if necessary.
- Change signatories with chapter bank account (if applicable). It is recommended that there are always a minimum of two signatories on any account.

ATD Chapters Diversity, Equity, and Inclusion

Embedding Diversity, Equity & Inclusion into Chapter Operations

Learn how chapters can use DEI as a lens to view chapter operations and think about why DEI should be a priority for chapters.

Diversity, Equity, & Inclusion Resources

ATD Chapters Diversity, Equity, and Inclusion

Diversity, Equity, and Inclusion (DEI) Resources

We want chapters to use DEI as a lens to view chapter operations. Think about why DEI should be a priority for your chapter. Our chapters represent a diverse group of talent development professionals with different perspectives and needs. When we address these in our chapter operations to give everyone a voice, we are able to make a positive impact that helps create a world that works better. Get on the same page with terms of the matter and how they are defined.

Chapter Board DEI Infographic

Chapter Leader DEI Assessment

DEI Toolkit for ATD Chapter Leaders

<https://www.td.org/chapters/clc/diversity-equity-and-inclusion>

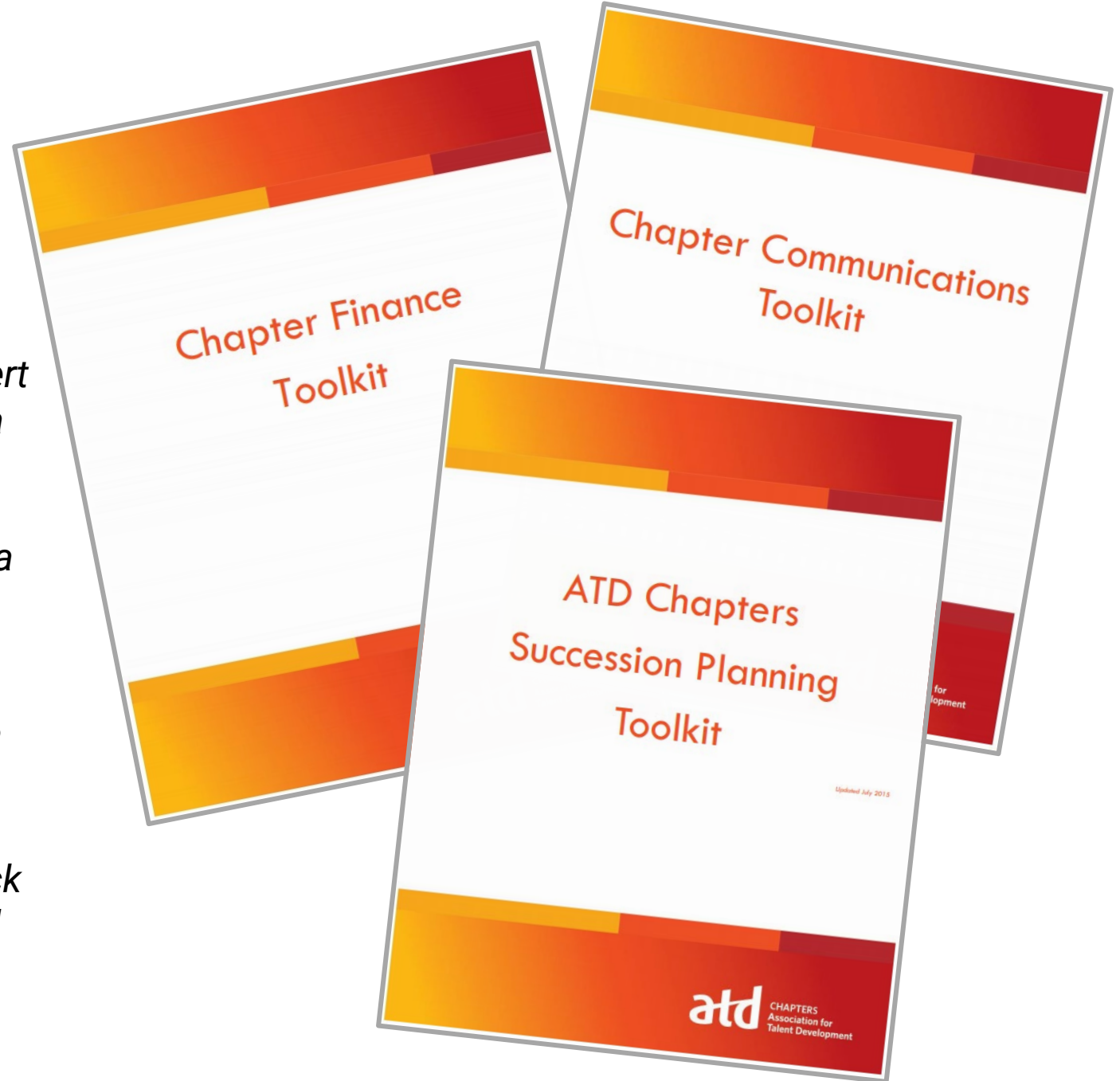


NAC Favorites



-Lisa Torreano,
PhD, CPTD
NAC for Nebraska,
Kansas City, St.
Louis,
Kentuckiana, and
Mississippi
chapters

*"It's unlikely you're an expert in every area of running a business/chapter. When you don't know where to start ... **ATD Toolkits** are a great place for help to jumpstart your initiative. Integrate and infuse DEI into your chapter's DNA? Onboard a new board member? Engage a new audience or partner? Check out the ATD Toolkits and accelerate your efforts."*



★ NAC Favorites

*"One of my favorite tools arrives in our inbox every month, and can also be found on the CLC website, the **Leader Connection Newsletter (LCN)**.*

This is a one-stop shop for all pertinent current events and deliverables for chapters."



-Dana Vogelmeier, CPTD

NAC for Lake Superior,
Twin Cities, Hawkeye,
Central Iowa, &
Mississippi Valley
chapters

October ATD Updates

Join the NAC's Orientation Webinar Series: Oct 24-Nov 6!

New in 2024, NAC and Chapter Services are hosting an Onboarding and Orientation week! A general orientation webinar will cover the foundational elements of chapter leadership, while role-specific sessions offer tailored insights and resources. All sessions are open to current, incoming, and potential future board members. [Learn more and register here.](#)

CARE Survey Platform Launch

CARE is right around the corner! CARE contacts will receive a unique link to access their chapter's CARE survey this month. The chapter president will receive the submission link by default for chapters that did not submit a CARE contact. Submissions are due by **January 31, 2025** (January 17 for early birds!). Continue reading below for additional resources.

Apply to Join the Chapter Recognition Committee (CRC) by November 1!

Are you interested in volunteering at the national level, learning about best practices in chapter operations, and celebrating chapters from across the country? [Apply to join the Chapter Recognition Committee \(CRC\)](#)! The CRC is an excellent opportunity for chapter leaders to continue their leadership journey. Applications are due **November 1**. Learn more below.

Submit a Proposal to Present at ALC 2025

The ALC RFP submission form will go live on **October 17**. Chapter leaders interested in presenting at ALC should **submit a proposal by December 6** for consideration. For more information on the submission process, [register to attend the informational webinar on October 17 at 2 p.m.](#) ET. Continue reading below for additional information.

★ NAC Favorites

Sharing Our Success (SOS): Resources created by chapters for chapters

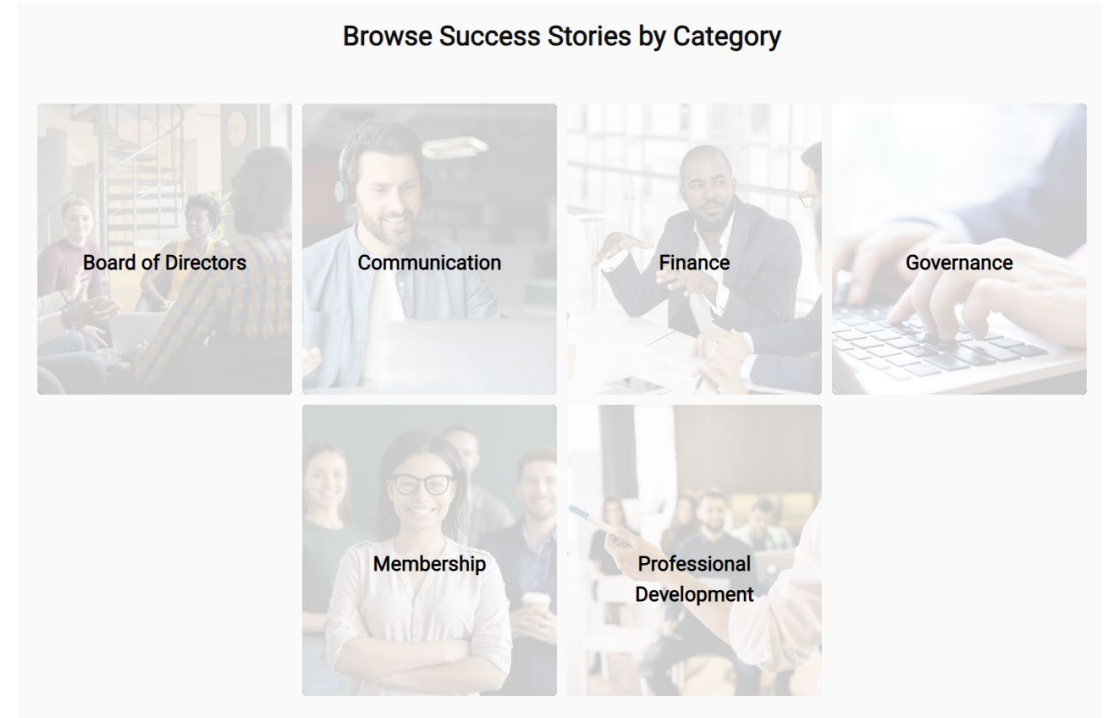


-Juliet Hart
NAC for
Central
Indiana,
Detroit, West
Michigan, Ann
Arbor, Detroit,
Chicagoland

*“The **SOS repository** is a wealth of knowledge when it comes to chapters sharing their best practices for success in areas from governance to programming to finance to communication.*

Going through past SOS-es can help chapters solve a current problem or jumpstart an idea for a new initiative. I recommend that any chapter leader go through previous SOS-es relevant to their role as part of their onboarding process.”

td.org/sos



Jenn Buckley,
CPTD
NAC for NY
Chapters

“SOS has been my go-to resource for years.”

atd CHAPTERS
Association for
Talent Development

Chapter Area Calls

A (mostly) monthly call hosted by two NAC for the chapters they each serve to help chapter leaders:

- Stay connected
- Build community
- Share best practices
- Solve critical challenges
- Learn from one another
- Receive pertinent updates from Chapter Services
- Expand your network



★ NAC Favorites



-Adam White, CPTD
NAC for Memphis,
Nashville, Baton
Rouge, New Orleans,
& Birmingham
chapters

*"I am a huge fan of the **chapter leader area calls**. I know that I walk away from each call with at least one item to discuss with my fellow chapter leaders to better serve our members. We have some great ideas to share and support our fellow chapters."*

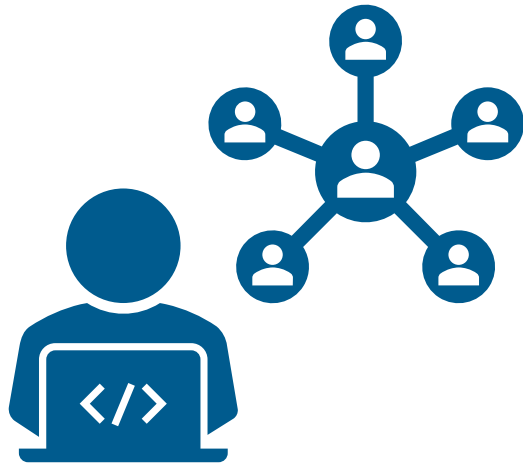
Chapter Leader Area Calls

Watch for invites and emails from your NAC

Growing as a Chapter Leader

Development Options

Virtual calls &
webcasts



Committees &
resource sharing



In-person
events



ALC 2025

atd CHAPTER
LEADERS
CONFERENCE



Washington D.C.
May 16–17, 2025

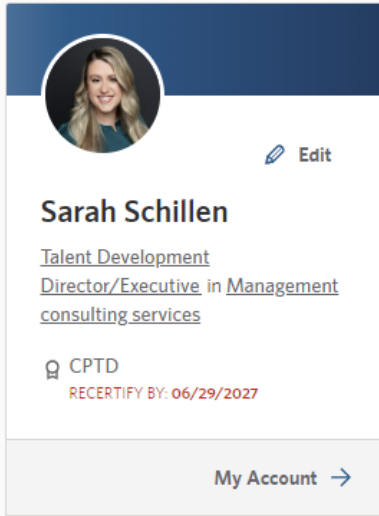
Hi, Sarah. Welcome back!


National Membership Benefits

Dashboard

My Activity


Benefits Center



 [Edit](#)




Sarah Schillen

[Talent Development](#)
Director/Executive in Management consulting services

 CPTD
RECERTIFY BY: 06/29/2027

[My Account](#) →

My Learning

<p>Needs Assessment Certificate</p> <p> June 20, 2024</p> <p>COURSE</p>	<p>ATD 2024 International Confer...</p> <p> May 19, 2024</p> <p>CONFERENCE</p>	<p>2024 ATD Chapter Leaders Conference</p> <p> May 17, 2024</p> <p>CONFERENCE</p>
--	---	--

[My Activity](#) →

My Membership

Professional Plus
EFFECTIVE: 03/22/2015 - 03/30/2025

Take advantage of all the member-only tools and resources to make the most of your membership.

[Visit the Benefits Center](#) →

My Topics

[Edit](#)

FOLLOWING 13 TOPICS

- Career and Leadership Development
- Change Management
- Coaching
- Consulting and Business Partnering

TD Capability Model

<p>Self-Assessment</p> <ul style="list-style-type: none">✓ Building Personal Capability✓ Developing Professional Capability✓ Impacting Organizational Capability <p>Reassess ></p>	<p>My Learning Path</p> <p>Certified Professional in Talent Development</p> <hr/> <p>My Learning Plan</p> <p>You have not created a learning plan.</p> <p>Get Started ></p>
--	--

[View Capability Model](#) →

<https://my.td.org/myatd/dashboard>

Recertification Points



atd CERTIFICATION INSTITUTE
Association for Talent Development

ATD Online Credential Management System

Candidate ID: 10947681

Certified Professional in Talent Development™ (CPTD)
Credential #:

PROFESSIONAL DEVELOPMENT POINTS PROGRESS

60 completed

You may begin posting recertification activities as soon as you earn the CPTD. **You will be able to submit your completed application beginning 90 days before the expiration date.**

Requirements

- ✓ Professional Development
- New Capabilities Continuing Education →

Recertification requires a total of 60 credits, distributed across several categories. **At least 20 points MUST be in the Continuing Education Category.** You will receive a maximum credit for each category as follows:

Category	Max Points/Cycle
Continuing Education	60
Leadership and Recognition	20
On-the-Job Experience	20
Research and Publishing	20
Speaking and Instructing	20
Professional Membership	15

Category	Examples	Points Per Year
Talent Development Officer, National	ATD Board Member ATD CI Board Member ATD Program Advisory Committee (PAC) National Advisors for Chapters (NAC) Board Member, National Organization	10
Talent Development Officer, Local	ATD Chapter President ATD Chapter Director of Certification ATD Chapter Director of Membership ATD Chapter Treasurer	7
Talent Development Committee Member - National	Editorial Board for talent development-related magazine	5
Talent Development Committee Member - Local	ATD Chapter Program Committee	5
Talent Development-Related Award from A National Talent Development Association	ATD CPTD Contributor Award ATD Volunteer Partnership Award	2
Talent Development-Related Award from A Local Talent Development Association	ATD Chapter Volunteer Award	1
ATD CI Activities (Public Relations support)	Certification Promotional Webcast, serving as a program ambassador	As assigned
ATD-Related Support Activities	ATD Review Team Member ATD Excellence in Practice Awards	5

Key Dates Calendar

**Under
Construction –
Will be
functioning in
2025**



CARE in Motion



Review	Review progress toward CARE achievement regularly with the entire board.
Collaborate	Collaborate as a board to complete CARE and CARE Plus.
Leverage	Leverage other chapters' best practices.
Participate	Participate on National Advisors for Chapters (NAC) area calls.

Questions?





Next Steps

- Review and bookmark your favorite resources at td.org/CLC
- Make sure you receive the ATD Leader Connection Newsletter (LCN)
- Collaborate with your chapter board to help achieve CARE
- Reach out to your Chapter Relations Manager (CRM) and National Advisor for Chapters (NAC) with questions
- Attend Role-Specific Onboarding Sessions next week!