



Chapter Affiliation Requirements (CARE) Workbook

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WELCOME

Dear Chapter Leader,

Welcome to the Chapter Affiliation Requirements (CARE) online submission form.

The CARE submission consists of questions around the six components of CARE: Board of Directors, Governance, Finance, Membership, Programming, and Communications. Each component will have questions related to the CARE achievement, CARE Plus achievement, and demographics. These questions will be labeled and will appear in the following order for each component.

Part 1: CARE Foundational – A self-reporting assessment evaluating the chapter's achievements of the 2019 CARE elements.

Part 2: CARE Plus – New to the survey this year is an optional tier known as CARE Plus. CARE Plus is a collection of best practices and its 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 Plus does not affect a chapter's ability to achieve CARE, and it is recommended that chapters attempt to answer the questions presented. 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.

Part 3: Demographics – These questions assist with chapters' ability to benchmark against one another and do not impact CARE achievement.

The CARE submission reports on a chapter's activities during the 2020 calendar year. Even if a chapter doesn't operate on a calendar year basis, as long as the chapter has met CARE during the calendar year, the chapter can base its submission on those accomplishments.

The deadline for completing the online CARE survey is January 31, 2021. To qualify for 100 percent completion of CARE, a chapter must complete the online survey by this date. Even if the chapter achieves 100 percent in all elements, submission of the online survey, and submission of all specified documentation is required by the deadline to be recognized as a chapter that has achieved 100 percent CARE.

To ensure consistency and accuracy in reporting, chapters are advised to identify and select one leader as your chapter's CARE contact. This person will receive your chapter's unique CARE survey submission link, and is responsible for receiving, reviewing, and appropriately disseminating all CARE news, updates, and requirements to chapter leadership, including completing and submitting the chapter's CARE survey by **January 31, 2021**. However, please note that CARE is and remains the responsibility of the entire board. Use this workbook to compile responses and review their accuracy prior to submission of the online survey.

If you need additional information about CARE, please visit the CARE website at td.org/care or contact your [chapter relations manager](#) (CRM).

Thank you for your ongoing time, commitment, and leadership!

ATD Chapter Services Team

GENERAL SURVEY INFORMATION

Chapter Address

This is your chapter's address currently on file with ATD:

Street: Post Office Box 19764
Line 2: _____
City: Birmingham
State: Alabama
Zip: 35209

Is the mailing address currently on file with ATD correct?

Yes

No

If the chapter selects “no,” please provide the updated address for the chapter.

Street: _____
Line 2: _____
City: _____
State: _____
Zip: _____

BOARD OF DIRECTORS: CARE FOUNDATIONAL ITEMS

(Please note: the below items impact a chapter's CARE achievement)

Chapter submits an incoming 2021 board roster using the [Excel template](#).

Having an accurate board roster for the chapter enables chapter services to share timely and helpful information with chapter leaders. Additionally, chapter leaders included on board rosters receive access to a discounted ATD Professional Plus membership. Please share updates with ATD Chapter Services as changes occur.

[File Upload] Please [click here](#)

The chapter board meets at least once per quarter.

True

False

Chapter board members maintain Power Membership (joint chapter/ATD national membership).

Validated by ATD Chapter Services.

True

False

Chapter maintains written position descriptions for elected members.

True

False

BOARD OF DIRECTORS: CARE PLUS ITEMS

The chapter provides a defined orientation/onboarding process for incoming board members.

True

False

How is the board member onboarding delivered?

In-person

Virtually this year 2020

Hybrid

What is the frequency of your board member onboarding?

Annually

As needed

In what month(s) does the board member onboarding occur? *Select one or more options*

January

February

March

April

May

June

July

August

September

X October

X November

X December

- What kind of coaching/mentoring does the chapter provide board members?

None

- Who leads the onboarding of new board member(s)?

President

Board member role dedicated to onboarding

Role predecessor

Other

If "Other," briefly explain who is leading the new board member(s) onboarding?

The chapter has a succession strategy for identifying and filling board member positions.

True

False

- Select all that apply.

- Has a nominating committee responsible for selecting future board members
- Offers opportunities to attend board meetings to educate prospective board members on board activities
- Maintains an ongoing list of prospective board members detailing the fit for a specific role and the individual's skills/traits
- Has board member dedicated to identifying future board members**
- Has multiple touch points with prospects to keep them engaged and informed**

- Does your chapter review its succession plan annually?

- Yes**
- No

The chapter has a volunteer recruitment strategy in place for positions that support the work of the board.

True

False

The chapter volunteer recruitment strategy includes:

Select all that apply.

- Volunteer open house
- Dedicated webpage highlighting opportunities
 - Please provide link.
- Volunteer job descriptions
- **Volunteer recruitment goal included in Annual Goals and Strategies (formerly operating plan)**
- **Targeted outreach to prospective volunteers**

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

Live attendance to be tracked by chapter services.

True

False

The chapter has board member(s) present at ATD Chapter Leaders Conference (ALC) annually.

Attendance to be confirmed by chapter services.

True

False

The chapter has an advisory board or council that involves past presidents in chapter activities.

True

False

Identify number of participants and list their names.

Eric Atkins

Pete Blank

Caitlin Tyler

The chapter board meets to strategically plan for the future.

True

False

When did the chapter board meet to create its strategic plan? December,
2019

- How long was the strategic planning meeting?

4 hours

BOARD OF DIRECTORS: DEMOGRAPHIC QUESTIONS

When are your chapter board meetings typically held?

Monthly

Bi-monthly (occurring every two months)

Quarterly

Other

- If "other," when are your chapter board meetings typically held?

Does your chapter pay for ATD membership dues for one or more chapter board members?

Yes

No

When do your incoming board members OFFICIALLY begin their terms?

1st Quarter (January – March)

2nd Quarter (April – June)

3rd Quarter (July – September)

4th Quarter (October – December)

GOVERNANCE: CARE FOUNDATIONAL ITEMS

(Please note: the below items impact a chapter's CARE achievement)

The chapter creates and submits a 2021 operational plan that includes but is not limited to: annual goals, communication/marketing strategy, recruitment/retention strategy, and succession planning strategy.

By sharing a copy of your chapter's operating plan, chapter relations managers and members of the National Advisors for Chapters can better support our chapter in achieving its strategic goals. Leverage the [Operating Plan Template](#) to create a plan for your chapter.

[\[File Upload\]](#)

The chapter's mission, vision, and bylaws align with those of ATD, and the chapter meets the ATD branding guidelines.

For the 2020 year, all chapters are required to submit current bylaws. [Please click here for copy of bylaws](#)

X True

False

The chapter complies with federal and state reporting requirements.

Submission of 990/990-N filings to chapter services is required. Requirements vary by state and may differ for incorporated versus non-incorporated chapters.

X True

False

The chapter members participate in the nomination and election of the chapter board.

X True

False

GOVERNANCE: CARE PLUS ITEMS

The chapter board maintains and updates its Standard Operating Procedures (SOPs) annually or as needed throughout the year.

X True

False

Which of the following do your SOPs include?

Select all that apply.

- Policies and Procedures**
- Chapter Background
- Mission & Vision**
- Strategic Goals**
- Organizational Chart
- Election of Officers**
- Job Descriptions**
- CARE Requirements**
- Past Presidents**
- Conflict of Interest Policy

The chapter board reviews its bylaws annually, including a review of the bylaws as part of board member onboarding.

X True

False

- Provide the date that bylaws were last reviewed.

The chapter makes board meeting minutes/summaries available to members.

X True

False

- How are board meeting minutes/summaries made available to members?

Select all that apply.

- Posted publicly on website
 - Please provide link. _____
- **Posted on website to members only**
- Emailed upon request
- Included in newsletter
- Other
 - Please explain additional ways the chapter makes board meeting minutes/summaries available to members.

The board maintains a central repository or document library for archiving important chapter documents.

X True

False

- What system does the chapter use as a central repository or document library for archiving important chapter documents?

Select all that apply.

- Box
- Dropbox
- **X Google Drive**
- **X One Drive**
- SharePoint
- **X Wild Apricot**
- Zoho
- Other

- If "Other," please list the platform the chapter is using.

GOVERNANCE: DEMOGRAPHIC QUESTIONS

What types of insurance coverage does your chapter have?

Select all that apply.

- **Directors and Officers liability insurance**
- Event-based insurance coverage
- General liability
- Professional liability

Is your chapter incorporated?

Maintaining accurate and up to date information about your chapter's EIN, tax-exempt status, and incorporation status is a best practice that can prevent the chapter from encountering costly legal issues in the future. To determine if your chapter is incorporated, visit your Secretary of State's website, and use the business entity search function.

- X Yes
- No

FINANCE: CARE FOUNDATIONAL ITEMS

(Please note: the below items impact a chapter's CARE achievement)

Chapter must upload its most recent balance sheet and income statement through the survey submission site by January 31, 2021.

- X True
- False

Most Recent Income Statement showing projected and actual numbers.

A brief explanation of any loss or gain should be provided. Chapter submits its most yearend profit and loss statement. Leverage the [income statement template](#).

[Please Click Here](#)

Most Recent Yearly Balance Sheet

Chapter submits its yearly balance sheet as of December 31, 2020. Leverage the [balance sheet template](#) available. [Please Click Here](#)

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.

- X True
- False

Employer Identification Number (EIN)

Please note the below will be auto-populated by chapter services for review.

54-1345811

Please confirm the above EIN listed is accurate.

- X True
- False

If not correct, please provide the chapter's correct EIN: _____

FINANCE: CARE PLUS ITEMS

The chapter has approximately three (3) to six (6) months of operating expenses set aside for emergency situations.

Should be noted on submitted financial statements. [Please click here](#)

X True

False

The chapter board completes a risk assessment and reviews it annually.

True

X False

Submit your chapter's risk assessment.

Leverage the [risk assessment template](#) if needed.

[File Upload]

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

Should be noted as a budget item on submitted financial statements.

X True

False

How many chapter leaders are budgeted to attend ALC in 2021?

Two

The chapter has a partnership strategy that identifies, recruits, and maintains partnerships to support chapter programming and operations.

Note: partners typically provide support/services outside of funds.

X True

False

List names of partner(s):

United Way of Birmingham

The chapter has sponsors to support chapter programming and operations.

X True

False

List names of sponsor(s):

FINANCE: DEMOGRAPHIC QUESTIONS

Does your chapter pay for any administration help, such as a management firm, or other administrative service?

- Yes
- No

If “yes,” please provide the following:

Administrative Contact Name _____

Administrative Company _____

Please provide the contact information for your chapter's administrative help below.

Street: _____

City: _____

State: _____

Zip: _____

MEMBERSHIP: CARE FOUNDATIONAL ITEMS

(Please note: the below items impact a chapter's CARE achievement)

2020 Chapter Membership Roster as of 12/31/20

Chapter submits year-end membership roster using the [Excel template](#).*

Collecting chapter membership rosters allows chapter services to maintain a historical record of chapter membership.

*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 Chapter Services with "Full Administrative Rights" access to your account (required for all chapters participating in the WA discount partnership program). For your reference, the username should match below:

Username: chapters@td.org

For more information on providing "Full Administrative Rights," please visit the [Wild Apricot help page on setting up administrators](#).

[File Upload]

The chapter board assesses its members' needs and satisfaction levels at least once per year.

- True

False

The chapter achieves by 12/31/2020 a minimum of 20 joint chapter/ATD members (the original chapter chartering requirement) and 35 percent of the chapter's membership simultaneously.

X True

False

The chapter completes 10 activities of the chapter's choice.

For support, review the [joint membership activities job aid](#).

X True

False

Please select all joint membership activities that the chapter completed in 2020.

Select all that apply.

- **Mentions Power Membership at the beginning of each chapter event**
- **Uses PowerPoint slides at each event highlighting Power Membership**
- **Has printed Power Member collateral displayed at each event**
- **Participates in the Chapter Membership on the ATD Store Program**
- **Participates in ATD Member Week by offering a 10 percent discount on its membership**
- **Shares best practices on joint membership with chapter leaders by presenting on NAC area calls, submitting an SOS, or presenting at ALC**
- Features a Power Member section in the chapter newsletter
- **Displays Power Member logos on chapter website**
- Has Power Member testimonials on website, in the chapter newsletter, and at meetings
- **Posts Power Member messages on social media**
- Promotes Power Membership at SIG/GIG meetings
- **Requests list of ATD members quarterly to identify prospects**
- **Requests joint membership percentage from your CRM quarterly**
- Promotes Power Membership at chapter conference(s)
- **Promotes Power Membership at chapter special event, including an information table with both chapter and ATD materials**
- Creates a group/corporate Power Membership structure
- **Discusses Power Membership at each board meeting**
- Conducts a membership drive
- Holds a program on the value of membership
- Conducts new member orientations
- Holds an event to recruit ATD members to chapter membership
- **Publicizes the special "Power Member" rate (e.g. Professional: \$229 or Professional Plus: \$369 for chapter members)**
- **Hosts a Power Member page on chapter website**
- **Highlights Power Membership in chapter emails**
- **Sends a targeted email to prospective members promoting Power Membership once a quarter**

- Other
 - If “other,” please provide a brief description of your activities.
-
- None of the above

What was the highest joint membership (members of both ATD national and your chapter) percentage achieved by the chapter in 2020?

*Chapters receive quarterly information about their joint membership percentage from their designated chapter relations manager (CRM). Please refer to these reports or contact your CRM to verify your chapter’s 2020 joint membership information. However, **the following three questions** will be populated with the information chapter services has on file for the chapter as of November 15, 2020. You will be given an opportunity to share your figures should you not agree with the data included below.*

To calculate your joint membership percentage, divide the number of Power Members (joint chapter-ATD national members) by the total number of chapter members. (Joint Membership % = joint members/chapter members)

52%

When your chapter achieved its highest joint membership percentage in 2020, what was the total number of joint members?

29

When your chapter achieved its highest joint membership percentage in 2020, what was the total number of chapter members?

This number should be greater than the answer given to the previous question.

56

In what month did this occur?

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- **December**

As of December 31, 2020, what percentage of your chapter’s members are joint members?

52%

As of December 31, 2020, how many joint members did your chapter have?

29

As of December 31, 2020, how many chapter members did your chapter have?

56

MEMBERSHIP: CARE PLUS ITEMS

The chapter has a member/volunteer recognition or spotlight program.

X True

False

How does the chapter create recognition?

Select all that apply.

- Hosts an appreciation event
- Provides an award or gift
- Recognizes at an in-person event
- Reserves a section in the newsletter

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

X True

False

What service does your chapter offer?

Select all that apply.

- Consultant referral services
- Job board
- Resume review workshop
- Other

If "other," please explain. _____

The chapter hosts an orientation for new members.

True

X False

How is the new member onboarding delivered?

In-person

Virtual

- Hybrid

- What is the program frequency?
 - Monthly
 - Quarterly
 - Twice a year
 - Annually
 - On-demand
 - Other
 - If "other," please describe _____

- What content is included in the onboarding?

Select all that apply.

 - ATD overview
 - Chapter background
 - Overview of events
 - Member benefits
 - Power Membership
 - Volunteer opportunities
 - Other
 - Please describe _____

The chapter tracks the retention rate of its members and determines a target retention rate to meet annually.

- True
- False**

Provide your chapter's average retention rate: _____

The chapter makes its membership available on the ATD Store.

To be pre-populated by chapter services.

- True**
- False

The chapter creates awareness about volunteering for the chapter and open positions.

- True**
- False

Volunteer recruitment resources include:

Select all that apply.

- Dedicated webpage with open volunteer positions
 - Provide webpage link _____
- Volunteer job descriptions
- Volunteer fair/event
- Webinar
- **Other**
 - If "other," please explain We promote volunteering each meeting

The chapter achieves a joint chapter/ATD membership rate of 45 percent or higher while meeting the 20 joint member minimum.

To be confirmed by chapter services.

X True

False

The chapter identifies those activities having the most impact on its joint membership rate.

X True

False

The chapter holds a membership campaign to recruit prospective members.

Note: The campaign should not include giving away chapter membership to prospects.

True

X False

MEMBERSHIP: DEMOGRAPHIC QUESTIONS

What was your chapter's average membership number for 2020?

62

Did your chapter raise dues in 2020?

Yes

X No

Does your chapter plan to raise dues in 2021?

Yes

X No

What will the chapter's new individual/regular membership dues be?

\$85

What are your chapter's current dues?
\$85

Which of the following dues categories does your chapter have?

Select all that apply.

- Group/Corporate member
- Senior member
- Student member
- Young professional member
- Other

How much are your corporate or group membership dues per member?
\$75

How much are your senior membership dues?

How much are your student membership dues?
\$42.50

How many student members does your chapter have? 1 current
member

Which of the following are requirements for a student to qualify for a chapter student membership rate?

Select all that apply.

- Attend an accredited university or college
- Demonstrate they are taking classes in a talent development related field
- Demonstrate they are in a degree program in a talent development related field
- Take a minimum number of credit hours
 - Please enter the number of credit hours.

- None of the above
 - Please provide criteria.

How much are your young professional membership dues?

Please list additional dues categories.

How much are your membership dues for the additional membership category?

Does your chapter provide ATD members a discount on chapter membership?

X Yes

No

If "yes," what is the percent of your discount? 10% off

PROGRAMMING: CARE FOUNDATIONAL ITEMS

(Please note: the below items impact a chapter's CARE achievement)

The chapter provides at least six (6) professional development activities per year for members.

Examples: webcasts, dinner programs, networking, monthly events, etc.

X True

False

PROGRAMMING: CARE PLUS ITEMS

The chapter offers a mentoring program/initiative for its members.

True

X False

How long is your program? _____

How many mentees did you have? _____

How many mentors did you have? _____

The chapter utilizes the ATD Capability Model in program development.

X True

False

Select the Capabilities used:

Select all that apply.

- Communication
- Emotional Intelligence and Decision-Making
- **Collaboration and Leadership**
- Cultural Awareness and Inclusion
- Project Management
- Compliance and Ethical Behavior

- Lifelong Learning
- Learning Sciences
- Instructional Design
- Training Delivery and Facilitation
- Technology Application
- Knowledge Management
- Career and Leadership Development
- Coaching
- Evaluating Impact
- Business Insight
- Consulting and Business Partnering
- Organization Development and Culture
- Talent Strategy and Management
- Performance Improvement
- Change Management
- Data and Analytics
- Future Readiness

The chapter hosts MORE THAN six professional development events each year.

Includes Special Interest Group (SIG)/Geographic Interest Group (GIG) events, webinars, etc.

X True

False

How many networking events did the chapter hold in 2020?

One

How many Special Interest Group (SIG) events did the chapter hold in 2020?

How many Geographic Interest Group (GIG) events did the chapter hold in 2020?

How many webcast events did the chapter hold in 2020?

The chapter hosts or partners with other local chapters to host a conference for its members and prospects.

True

X False

- When did the chapter's conference take place?

- What was the conference theme? _____
- How many people attended the conference?

- What ATD chapters, if any, did the chapter partner with on the conference?

The chapter offers its own study groups for the Associate Professional in Talent Development (APTD) and/or Certified Professional in Talent Development (CPTD).

- True
- X False**

- What type of study group does the chapter offer?
Select all that apply.
 - APTD
 - CPTD
- On average, how many study groups did your chapter run in 2020?

- What is the average number of participants per study group?

- On average, how many study groups did your chapter run in 2020?

- What is the average number of participants per study group?

PROGRAMMING: DEMOGRAPHIC QUESTIONS

When are the majority of your regular programs held?

- Morning
- X Lunchtime**
- Afternoon
- Evening
- Other
 - If "other," please explain: _____

€ What is the average number of people at your regular chapter meeting? 20 in 2020 due to changing to virtual meetings only _____

€ What is the approximate registration fee for a chapter member to attend a chapter program?
Free for members/virtual meetings in 2020

€ What is the approximate registration fee for a chapter non-member to attend a chapter program?
\$10

€ What is the approximate registration fee for a chapter member to attend a chapter-sponsored conference?
N/A

€ What is the approximate registration fee for a chapter non-member to attend a chapter-sponsored conference?

€ N/A

COMMUNICATION: CARE FOUNDATIONAL ITEMS

(Please note: the below items impact a chapter's CARE achievement)

The chapter maintains a current website with up-to-date information.

€ True

€ False

The chapter disseminates a communication piece to members at least once per quarter that includes chapter and ATD programs and initiatives.

€ True

€ False

The chapter board shares with members the following information at least once per year: membership numbers, financial performance, and progress toward annual goals.

The format can be a formal report, video, infographic, table tents at events, newsletter article, etc.

€ True

€ False

COMMUNICATION: CARE PLUS ITEMS

The chapter communicates with its membership about non-programming information. This can be included in a blog, video blog (vlog), newsletter, etc.

X True

False

What does the chapter use?

Select all that apply.

- Blog
- Facebook page
- Instagram
- LinkedIn group
- Newsletter
- Video blog
- Twitter
- YouTube
- Instagram

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

X True

False

The chapter provides a member-only section through the chapter's website or social media platforms.

X True

False

Provide a brief description of what information is provided behind member-gateway or social media channels used? Past programs information, chapter business, private member directory

The chapter participates in and promotes Employee Learning Week (ELW).

X True

False

What did your chapter do to support Employee Learning Week?

Select all that apply.

- Hosted a themed event
- Organized an awards program
- Received a state proclamation
- Organized a relevant communications plan
- Hosted a webinar

- **Other**
 - Please describe: Post on social media

COMMUNICATION: DEMOGRAPHIC QUESTIONS

Which of the following does your chapter have?

Select all that apply.

- Facebook
- **What is your Facebook link?** [\(3\) ATD Birmingham | Facebook](#)
- Instagram
 - What is your Instagram username? [ATD Birmingham \(@birminghamatd\) • Instagram photos and videos](#) _____
- LinkedIn group
 - What is your LinkedIn group name? [\(7\) ATD Birmingham Chapter | Groups | LinkedIn](#) _____
- Pinterest
 - What is your Pinterest username? _____
- Snapchat
 - What is your Snapchat username? _____
- TikTok
 - What is your TikTok username? _____
- Twitter
 - What is your Twitter username? _____
- Other
 - What other social media does your chapter have?

- None of the above