

CARE FOUNDATIONAL AND PLUS PLANNER 2021



PRIMARY CHAPTER CARE CONTACT:

CATEGORY	ELEMENTS	STARTING	ENDING	DONE
Board of Directors	Board Meetings: Chapter board meets at least once per quarter.			
	Board Roster: Chapter submits an incoming board roster in Excel template.			
	Professional Development: Chapter board members maintain Power Membership (joint chapter and ATD national membership).			
	Position Descriptions: Chapter maintains written position descriptions for elected members.			
CARE Plus (Select Four)				
Governance	Operating Plan: Chapter creates and submits an operational plan for the coming year.			
	Governing Documents: The chapter's mission, vision, and bylaws align with those of ATD, and the chapter meets the ATD branding guidelines.			
	Government Reporting Requirements: Chapter complies with federal and state reporting requirements. Submission of 990/990-N filings to chapter services is required.			
	Board Selection: Chapter members participate in the nomination or election of the chapter board.			
CARE Plus (Select Two)				

CATEGORY	ELEMENTS	STARTING	ENDING	DONE
Finance	Budget: The chapter board develops and approves an annual operating budget and makes it available to members.			
	Financial Documents: Chapter submits most recent yearly balance sheet.			
	Financial Documents: Chapter submits most recent profit and loss statement.			
	Financial Review: Chapter board has an internal or external financial review completed annually by a person or group not directly responsible for the management of chapter finances.			
CARE Plus (Select Three)				
Membership	Membership Roster: Chapter submits year-end membership roster in Excel.			
	Member Feedback: Chapter board assesses member needs and satisfaction levels at least once per year.			
	Power Membership: Chapter achieves a minimum of 20 Power Members (joint chapter and ATD national members) and 35 percent simultaneously.			
	Power Member Activities: Chapter completes 10 Power Member activities of the chapter's choice.			
CARE Plus (Select Six)				

CATEGORY	ELEMENTS	STARTING	ENDING	DONE
Programming	Chapter Programs: Chapter provides at least six professional development activities per year for members.			
CARE Plus (Select Three)				
Communication	Website: Chapter maintains a current website with up-to-date information.			
	Member Communication: Chapter distributes a communication piece to members at least once per quarter that features chapter and ATD programs and initiatives.			
	Annual Report: Chapter board shares an annual report with members noting membership numbers, financial performance, and progress toward goals.			
	National Support: Board members hold, at minimum, an annual phone call with their chapter relations manager to identify opportunities for support.			
CARE Plus (Select Two)				

CHAPTER RELATIONS MANAGER:

NATIONAL ADVISOR FOR CHAPTERS:

CARE JOINT MEMBERSHIP ACTIVITIES



PRIMARY CHAPTER CARE CONTACT:

ACTIVITIES SELECT A MINIMUM OF 10			
	DONE		DONE
Host a Power Member page on chapter website		Highlight Power Membership in chapter email communications	
Send quarterly email to prospective members promoting Power Membership		Participate in the Chapter Membership on the ATD Store program	
Mention Power Membership at the start of each chapter event		Promote Power Membership at SIG and GIG meetings	
Power Member benefits using rotating PowerPoint at events		Request list of ATD members quarterly; identify prospects	
Use printed Power Member collateral at each event		Request joint membership calculation from CRM quarterly	
Power Member section in chapter newsletter		Promote Power Membership at chapter special events	
Power Member logos on chapter website		Create group/corporate Power Membership offering	
Power Member testimonials on website, newsletter, and other media		Talk about Power Membership at each board meeting	
Power Member messages on social media		Conduct an orientation for new Power Members	
Share a joint membership best practice on a NAC area call, SOS, or at ALC		Hold a program on the value of Power Membership	
Hold an event to recruit ATD members		Promote Power Membership at chapter conference	
Conduct a Power Member drive		Publicize the special "Power Member" rate (for example Professional: \$249 or Professional Plus: \$409 for chapter members)	

2021 CALENDAR

JANUARY						
S	M	T	W	T	F	S
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31						

FEBRUARY						
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MARCH						
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APRIL						
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JUNE						
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JULY						
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AUGUST						
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SEPTEMBER						
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OCTOBER						
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NOVEMBER						
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DECEMBER						
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