2020 Chapter Leader Orientation and Onboarding

What every chapter leader needs to know to get started!
Welcome, Chapter Leaders!

Meet today’s facilitators

Michelle Baker
National Advisor for Chapters
Florida/Puerto Rico Chapters

Bonnie Moore
National Advisor for Chapters
Texas Chapters

Lisa Goodpaster
National Advisor for Chapters
Tennessee/Virginia Chapters

Erin Murphy
Senior Manager, Chapter Services
Chat in questions throughout the webcast!
Why did you become an ATD chapter leader? What chapter are you from, and what is your role?

Hover over the bottom of your screen to select the chat icon. Or, click the hand icon by your name to “raise your hand.”
Reference and complete the Chapter Leader Onboarding Checklist throughout the webcast!

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Get to Know Your National Advisor for Chapters (NAC)</td>
<td>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.</td>
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<tr>
<td><a href="http://www.td.org/nac">www.td.org/nac</a></td>
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<tr>
<td>Get to Know Your Chapter Relations Manager (CRM)</td>
<td>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.</td>
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<tr>
<td><a href="http://www.td.org/crm">www.td.org/crm</a></td>
<td></td>
</tr>
<tr>
<td>Watch the Chapter Leader Onboarding and Orientation Webcast</td>
<td>Watch the onboarding webinar 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.</td>
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<td><a href="http://www.td.org/chapter-webcast-search">www.td.org/chapter-webcast-search</a></td>
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</tr>
<tr>
<td>Visit the Chapter Leader Community (CLC)</td>
<td>Visit the Chapter Leader Community (CLC) to access tools and resources for effectively running your chapter.</td>
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<td><a href="http://www.td.org/clc">www.td.org/clc</a></td>
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<tr>
<td>Browse the Sharing Our Success (SOS) page</td>
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<tr>
<td>Read the Leader Connection Newsletter (LCN)</td>
<td>Read this monthly newsletter to receive information you need to run a successful chapter.</td>
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<tr>
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<td></td>
</tr>
<tr>
<td>Review the Available Toolkits</td>
<td>Review toolkits to access information, tools, and templates designed for ATD chapter leaders.</td>
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<tr>
<td><a href="http://www.td.org/toolkits">www.td.org/toolkits</a></td>
<td></td>
</tr>
<tr>
<td>Watch Chapter Webcasts</td>
<td>Watch archived recordings of webcasts on various topics related to chapter leadership and operations.</td>
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<td>Review Chapter Affiliation Requirements (CARE)</td>
<td>Learn about Chapter Affiliation Requirements (CARE), a set of performance guidelines designed to help chapters deliver consistent benefits to members. Chapters must complete and submit CARE annually on January 31.</td>
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<td><a href="http://www.td.org/CARE">www.td.org/CARE</a></td>
<td></td>
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<tr>
<td>Review Power Membership Resources</td>
<td>Review ideas and templates for promoting joint chapter and ATD membership.</td>
</tr>
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<td><a href="http://www.td.org/jointmembership">www.td.org/jointmembership</a></td>
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</tbody>
</table>
Empower professionals to develop talent in the workplace.

Mission
Empower professionals to develop talent in the workplace.

Vision
Create a world that works better.

www.td.org/about
ATD Chapter Services

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www.td.org/crm
ATD Chapter Relations Manager Map

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

Large Chapters
- Cascadia
- Chicagoland
- Dallas
- Greater Atlanta
- Greater Philadelphia
- Houston
- Metro DC

Lauren Abrahamson
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www.td.org/crm
Chapter Relations Manager (CRM)

Your CRM can work with your chapter to...

- Provide administrative, governance, membership, and marketing guidance
- Lead WebEx meetings to familiarize chapter board members with resources available from ATD
- Participate in a board meeting or retreat in person or via conference call
- Support a chapter event with ATD materials
- Share information and resources to assist your chapter in completing the annual Chapter Affiliation Requirements (CARE) submission
- Connect boards with other chapter leaders around the country to share solutions to common challenges and identify best practices
- Conduct phone meetings with board members
- Answer questions about ATD content, programs, and resources

www.td.org/crm
National Advisors for Chapters (NAC)

NAC can work with your chapter to...

- Link chapters with common needs
- Provide guidance about items related to the Chapter Affiliation Requirements (CARE)
- Assist chapters with facilitating their annual board retreat
- Poll chapter leaders through area calls
- Help leaders find resources from ATD
- Advise and coach chapters about ATD initiatives
- Identify and share best practices
- Advise ATD staff about issues of importance to chapters
- Identify and examine future roles for chapters
- Bring issues of interest to chapters to the attention of the ATD Board of Directors
- Ensure that the needs of chapters are recognized by ATD

www.td.org/nac
Meet Chris Coladonato, CPLP!
NAC Chair and Member of the ATD Board of Directors
Fellow Chapter Leaders

ATD Chapter Leaders
Welcome! The ATD Chapters Leaders Group will easily allow chapter leaders to connect on latest news and announcements, key dates and upcoming events, and essential resources related to membership, chapter administration, communications, leadership development, and partnerships...

ATD Chapter Leaders Group
Unlisted group

LinkedIn

Regular area calls hosted by your NAC
Quick Quiz

What does NAC stand for?

A. National ATD Council

B. National Advisors for Chapters

C. National Authority for Chapters
What questions do you have?
Connect
Chapter Leader Community (CLC)
Learn | Share | Succeed

To find a topic quickly, download the short links map or use the Chapter Leader Community search.

Best Practices
Find best practices, resources, and programs that are easy to implement for every chapter.

- Chapter of the Month
- Sharing Our Success (SOS)
- Chapter Excellence Awards

www.td.org/clc
Bookmark the short links map to easily navigate the CLC.
You can also navigate the CLC by using the section map, located in the top right corner of the page.
Content on the CLC is broken out into 5 main categories: administration, finance, membership, board development, and communications & marketing.

Select a category to view a drop-down menu with additional resources.
Leader Connection Newsletter (LCN)

- Distributed monthly
- Shares information about important chapter and ATD updates, resources, events, and more!
- Archived issues available online in the CLC
Social Media

@ATDCHAPTERS
Connect and chat with other chapters on Twitter: https://twitter.com/atdchapters/lists/atd-chapters

www.facebook.com/chapterleaders

www.linkedin.com
Quick Quiz

List one way that you can connect with other ATD chapter leaders.
Resources
Chapter Leader Toolkits

- Annual Membership Survey Job Aid
- Area Chapter Leaders Conference Toolkit
- Change Agility Session Toolkit
- Chapter Advocacy Toolkit
- Chapter Finance Toolkit
- 990 Filing Information
- Chapter Interest Group Toolkit
- Chapter Risk Assessment Guide
- Chapter Communications Toolkit
- Developing a Chapter Awards Program Toolkit
- Employee Learning Week Toolkit
- Engaging Students and New Professionals
- Group Tax Exemption Information
- Incorporation Information
- Maximize Chapter Value While Minimizing Costs
- Public Policy Toolkit
- Succession Planning Toolkit
- Working With Partners

www.td.org/toolkits
Speakers Bureau and Speaker Request Form

Identify speakers for upcoming chapter programs and conferences. Search through the database by name, location, fee, area of expertise, and/or chapters/conference they have previously spoken at.

Request an ATD representative to speak at a chapter event or meeting.

www.td.org/speakerrequestform
ATD Partnerships

Website and membership management services

Chapter branded products and merchandise

Event management and registration

Directors & Officers (D&O) insurance

www.td.org/atdpartnerships
Wild Apricot Services

Website, membership, and event management.

Do you need help with Wild Apricot?

- Review the boot camp recordings in the CLC
- Visit gethelp.wildapricot.com for instructional articles and videos
- Submit a ticket at support.wildapricot.com
- Call 877.493.6090

www.td.org/wildapricot
Quick Quiz

Wild Apricot is a software for:

A. Membership management
B. Event management
C. Website management
D. All of the above
Chapter Leader Day

- Connect with other ATD chapter leaders
- Share ideas and best practices
- Learn about ATD resources
- Registration open

Sunday, May 17
ATD 2020
Denver, CO

www.td.org/cld
Chapter-Related Committees

Chapter Recognition Committee (CRC)

- Identify, recognize, and share best practices
- Recommend and select Sharing Our Success (SOS) submissions
- Recommend and select Chapter of the Month (COM)
- Two-year term
Chapter Recognition

Sharing Our Success (SOS)
www.td.org/sos

Chapter of the Month (COM)
www.td.org/com

Chapter Excellence Awards
www.td.org/cea
Deadline to apply: 12/31/20
Review individual submissions and links to additional resources.

NEBRASKA CHAPTER: Best Practices for Membership Engagement Through LinkedIn

SUMMARY: The chapter aimed to extend its reach on LinkedIn and build a social media following of its membership base and beyond. Because each channel is unique and requires its own strategy to maximize engagement, different tactics were built around the company page, group, and personal LinkedIn accounts for the chapter. Furthermore, targeted messaging on each page generated different conversations that varied the published content. Because LinkedIn is a main driver to the chapter’s website, the chapter believes this approach enables them to reach more people and deliver more relevant content.

- Nebraska - SOS Submission Form

YEAR: 2018
Chapter-Related Committees

ATD Chapter Leaders Conference Program Advisory Committee (ALC PAC)

➢ Review and recommend session proposals
➢ Recommend keynote speakers
➢ Solicit conference sponsors
➢ Serve as host committee during the conference
➢ One-year term
Selected ALC facilitators receive complimentary registration!

March 10
1 p.m. ET
Quick Quiz

Fill in the blank:

The Chapter Recognition Committee recommends and selects both __ submissions and the __.
Quick Quiz

Who should attend ALC?

A. All chapter leaders
B. Chapter presidents and presidents elect
C. Chapter administrators
What questions do you have?
grow
your chapter
ATD Membership

- Chapter leader rate: $179
- Complimentary upgrade to Professional Plus membership
- Available for purchase on the ATD Store
- Use the “convince your boss” letters for **chapter leadership** and **Power Membership** to get support from your employer!

★ The chapter leader rate will appear towards the end of the checkout process.

www.td.org/join
Joint Membership

- Joint Membership = Power Membership
- Joint membership activities are included in CARE
- Power Membership applications, logos, brochures, emails, and additional templates are available on the CLC
- Check out www.td.org/SOS for additional ideas on ways to promote joint membership
Chapter Membership on the ATD Store

- Streamlines Power Membership purchases and enables members to sync membership end dates
- More than 60 chapters are currently participating in the program
- Review the eligibility requirements and overview document and watch the webcast
- Contact Erin Murphy at emurphy@td.org to learn more!
Chapter Incentive Program (ChIP)

- Revenue-sharing program on qualifying ATD purchases
- Each chapter has its own ChIP code (i.e. CH1234)
- Select your chapter’s name from the drop-down menu anytime you, your members, or non-members make ATD purchases to generate revenue for your chapter

Check out the Chapter Incentive Program toolkit to learn about best practices for promoting the use of your chapter’s ChIP code and increasing the chapter’s ChIP revenue.
Select your chapter name here to apply the chapter’s ChIP code to your order.
Find upcoming, local certificate programs and events to share with your membership and earn revenue!

www.td.org/events
www.td.org/education
Quick Quiz

Which resources can help your chapter increase its joint membership?

Select all that apply.

A. Chapter Incentive Program
B. Power Membership Resources
C. Chapter Membership on the Store
D. ATD Education/Chapter Partnership Program
Chapter Affiliation Requirements (CARE)
Chapter Affiliation Requirements (CARE)

- Performance guidelines designed to help chapters deliver consistent benefits to members
- Focuses on elements in 6 key areas: Board of Directors, Communication, Finance, Governance, Membership, and Programming
- Identify your chapter’s CARE contact by September 30
- Early bird submission deadline: January 15
- Final submission deadline: January 31
Required

Optional
The Chapter Affiliation Requirements are:

A. Performance guidelines designed to help chapters deliver consistent benefits to members

B. A series of activities that address six key areas: Board of Directors, Communication, Finance, Governance, Membership, and Programming

C. A clear set of standards that enables chapters to function like a business

D. All of the above
Final Questions?
Chapter Webcasts

All chapter leaders are invited to attend these free webcasts that focus on leadership, management, and growth!

Chapter Leader Roundtables

The Chapter Leader Roundtable is a virtual discussion open to all chapter leaders as an opportunity to come together and share ideas that work. Held every other month, each Roundtable will be driven by a single question. Come prepared to share your answer and to learn from fellow chapter leaders in these lively discussions and leave the Roundtable with a list of great ideas that work.

Monday, December 10, 12 p.m. ET: Communities of Practice & Special Interest Groups
What causes your community of practice or special interest group to be successful?
Register

Previously recorded chapter leader webcasts

CARE Informational and Planning Webcast

Thursday, November 2, 2017

Join the NAC administration team to review the Chapter Affiliation Requirements (CARE) and best practices for completing CARE prior to the January 31, 2018 submission deadline.

Join the conversation #ATDCARE

www.td.org/chapterwebcasts
We are here to help!

www.td.org/crm

www.td.org/nac
Thank you for your leadership!