Chapter Affiliation Requirements (CARE)

Best Practices, Tools & Resources, and CARE Survey Platform

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Your Presenters today

Jess Almlie, NAC

Valley of the Sun | Northern Rockies | Pikes Peak | Rocky Mountain | New Mexico | Greater Las Vegas

Elizabeth Beckham, NAC

Arkansas | Baton Rouge | Birmingham | Mississippi| New Orleans| North Louisiana | Northwest Arkansas

Stephanie Hubka, CPTD, NAC

Golden Gate | Inland Empire | Los Angeles | Orange County Sacramento | San Francisco | SF East Bay

Lorinda Schrammel, NAC

Chattanooga Area | Greater Richmond | Memphis | Nashville | Smoky Mountain | Southeastern Virginia | Valleys of Virginia

Lauren Abrahamson, CRM

Chapter Relations Manager, Western Area

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Agenda

- Getting Ready for CARE
- Best Practices
- Tools & Resources
- The CARE Survey Platform and Workbook
- Q&A

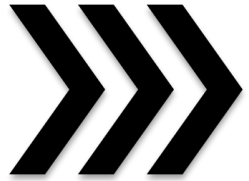# Chat in questions throughout the webcast!

WHAT IS YOUR #1
CARE CONCERN?

Get Ready for CARE!

Deliver **consistent brand & member experience**

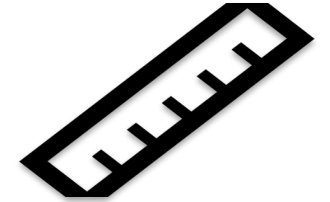Identifies **areas of support**

Mitigates **risk**

Provides **key info about business functions**

Allows for **benchmarking**

Tips for making the most of today's session:

- Take notes.
- Ask questions.
- Follow along on your own device.

CARE Completion:
Best Practices

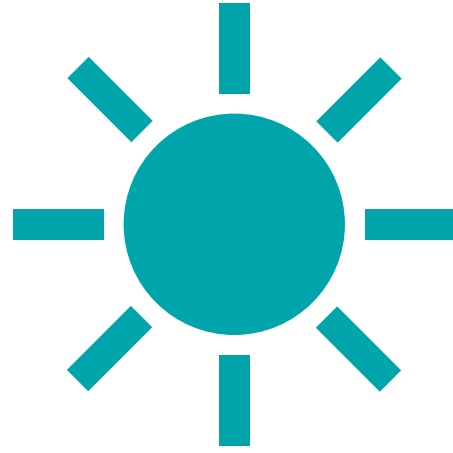"**Anticipation** is almost always worse than **reality.**"

-Unknown

Best Practice:
Remember and use your resources

Poll: **Who is the best person to gather info and complete CARE?**

Best Practice:
*Work **collaboratively** across your **entire board** to gather needed information and complete CARE and CARE Plus.*
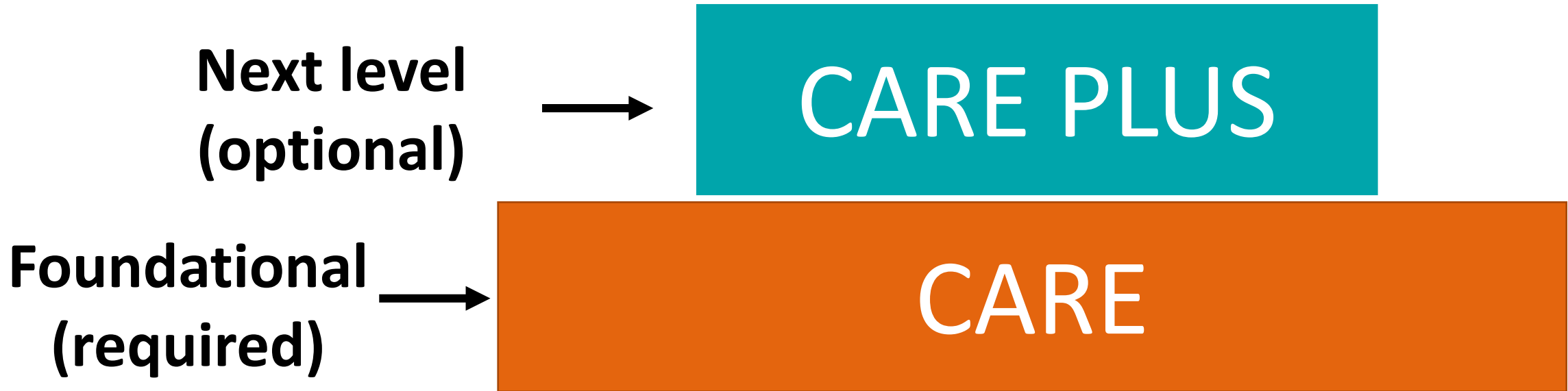
Best Practice:
Start early *to reduce stress and finish on time.*

Best Practice:
Don't say no *without talking to your **NAC** or **CRM** first!*

CARE Tools & Resources

CARE vs. CARE Plus

Next level (optional) → CARE PLUS

Foundational (required) → CARE

CARE Breakdown

Board of Directors

Communication

Finance

Governance

Membership

Programming

CARE Resources

CARE Resources

+ **2020 CARE Submission Summary (Chapters reporting on the 2019 calendar year)**

+ **CARE Workbook** ⭐

+ **CARE Foundational and Plus Planning Tool** ⭐

+ **CARE Foundational Requirements and CARE Plus Element Quick List** ⭐

+ **CARE Foundational Element Matrix** ⭐

+ **CARE Plus Element Matrix**

+ **Joint Membership Job Aid**

+ **CARE Webcast: Reviewing 2019 and Preparing for 2020**

+ **Risk Assessment Guide**

+ **Annual Report Template**

+ **Game of CARE**

Addendum Document Resources

+ **2020 CARE Membership Roster**

+ **2021 CARE Board Membership Roster**

+ **2021 Chapter Operating Plan**

+ **Most Recent Yearly Balance Sheet and Income Statement**

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CHAPTER AFFILIATION REQUIREMENTS (CARE): FOUNDATIONAL LEVEL ELEMENT MATRIX

Chapters are expected to meet each item listed in the CARE Foundation tier. CARE Plus is an optional tier in which a chapter should complete at minimum the number of items noted in each category. 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. For questions, please contact your chapter relations manager (CRM).

CARE Foundational Element	Why	How
BOARD OF DIRECTORS		

The chapter board meets at least once per quarter and makes meeting minutes available to members.	Board meetings are the time and place for chapter leaders to monitor the chapter's financial situation, address chapter issues, agree upon solutions, communicate the status of ongoing projects, and develop future chapter leaders. Since the board makes legally binding decisions for the chapter, it is a good practice for leaders to share the results of these meetings with chapter members. This builds members' trust and gives them an opportunity to engage in chapter activities, including volunteering.	**Recommendations on how to accomplish:**
		• Organize board meetings via these venues:
		   • in person (recommended)
		   • virtual (conference call, web conferencing, among other ways).
		• Maximize meeting effectiveness by following standard meeting guidelines such as using an agenda, establishing timeframes, and encouraging contribution for instance.
		• Capture minutes and share with members how meeting minutes can be accessed. Minutes may share key decisions and actions rather than detailed minutes of who said what.
		
		Samples from other chapters:
		• New York City: Board Meeting Position Status Report Templates
		• Tulsa Board Meeting Minutes
		• Valley of the Sun: Board Meeting Minutes Collaboration

The chapter submits a current board roster in Excel with CARE submission and updates ATD Chapter Services	Providing a current board roster as well as updates when changes occur helps build a connected ATD community. This allows for the dissemination of information about	**Recommendations on how to accomplish:** • Submit a current chapter board roster to ATD Chapter Services using the MS Excel board roster

Resources Available for Most Missed Elements

CARE Plus Element Matrix

Sharing Our Success: New Member Orientation

Sharing Our Success: Mentor Programs

Sharing Our Success: Chapter Conferences

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People Resources

td.org/CRM
td.org/NAC

atdCARE

chapter affiliation requirements

Chapter Affiliation Requirements

(CARE)

Workbook

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Next Steps

- **Schedule** time to review the <u>2021 CARE Planning Workbook</u> with your board.

- **Review** the available resources at <u>www.td.org/CARE</u>.

- **Contact** your <u>CRM</u> or <u>NAC</u> with questions.

- **Submit** your CARE survey and addendum documents by January 31, 2022.

  - Early submission date is January 14, 2022!