

# 2023 Chapter Affiliation Requirements (CARE) Submission Summary



# 2023 CARE Submission Summary

## CHAPTERS REPORTING ON THE 2022 CALENDAR YEAR

### 2023 CARE SUBMISSION SUMMARY

Section 1: Executive Summary

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**If you have any questions regarding the 2023 CARE Submission Summary, please contact:**

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## SECTION 1: EXECUTIVE SUMMARY

### Submission Results

As of the CARE submission deadline date (January 31, 2023):

- 83 out of 88 active chapters (94%) completed the CARE submission process.
- 74 chapters (89%) achieved 100% in all elements. In 2021, 74 chapters also achieved 100% in all elements, representing 76% of completed CARE submissions. The joint membership percentage remains the most missed element.

### Achievement Data

The 74 submitting chapters self-evaluated their percentage of achievement in the 21 elements.

#### 1. 100 Percent of Achievement

Element Number	Element Description
<b>Board of Directors</b> 1.1	The chapter board meets at least once per quarter.
1.2	Chapter submits an incoming 2023 board roster using the Excel template.
1.4	Chapter maintains written position descriptions for elected members.
<b>Governance</b> 2.1	The chapter creates and submits a 2022 operational plan that includes, but is not limited to, annual goals, communication/marketing strategy, recruitment/retention strategy, and succession planning strategy.
2.2	The chapter's mission, vision, and bylaws align with those of ATD, and the chapter meets the ATD branding guidelines.
2.3	The chapter complies with federal and state reporting requirements.
<b>Finance</b> 3.1	The chapter board develops and approves an annual operating budget and makes it available to members.
3.2 and 3.3	The chapter must upload its most recent balance sheet and income statement through the survey submission site by January 31, 2022.
3.5	Confirm the chapter's employer identification number (EIN) is accurate.
<b>Membership</b> 4.1	Upload the chapter membership roster by December 31, 2021.
4.2	The chapter board assesses its members' needs and satisfaction levels at least once per year.
<b>Communication</b> 6.1	The chapter maintains a current website with up-to-date information.
6.4	Board members hold, at minimum, an annual phone call with their chapter relations manager to identify opportunities for support.

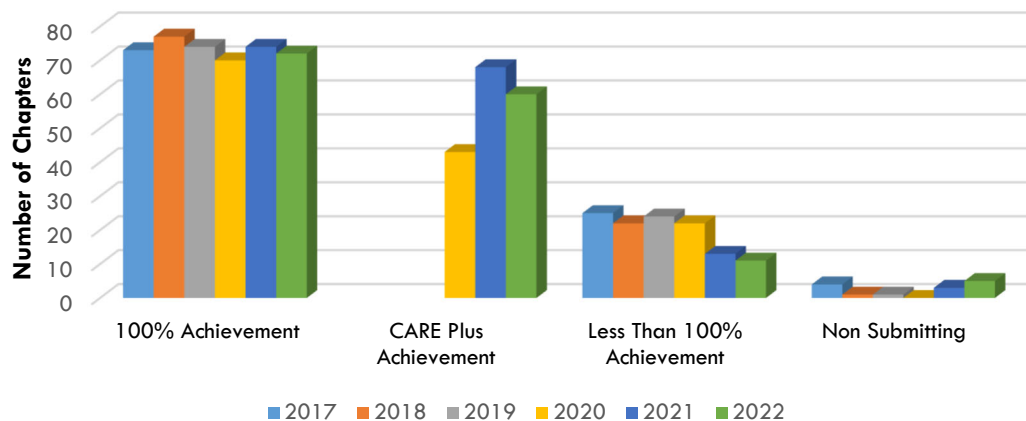
## 2. Less Than 100 Percent of Achievement

Element Number	Element Description	Chapter % at 100% Achieved
<b>Board of Directors</b> 1.3	Chapter board members maintain Power Membership (joint chapter/ATD national membership).	99%
<b>Governance</b> 2.4	The chapter members participate in the nomination and election of the chapter board.	99%
3.4	Chapter board has an internal or external financial review completed annually by a person or group not directly responsible for managing chapter finances.	98%
<b>Membership</b> 4.3	By December 31, 2022, the chapter achieves a minimum of 20 joint chapter/ATD members (the original chapter chartering requirement) and 35 percent of the chapter's membership simultaneously.	90%
4.4	Chapter completes 10 Power Member activities of the chapter's choice.	96%
<b>Programming</b> 5.1	The chapter provides at least six professional development activities per year for members.	98%
<b>Communication</b> 6.2	The chapter distributes a communication piece to members at least once per quarter, including chapter and ATD programs and initiatives.	98%
6.3	At least once per year, the chapter board shares an annual report with information about membership numbers, financial performance, and progress toward annual goals with its members.	95%

## What Does the CARE Information Tell Us?

The 2023 CARE results for ATD's 88 active chapters were:

### Chapter CARE Achievement



## SECTION 2: CHAPTER RESULTS

As of the CARE submission deadline date (January 31, 2023):

- 83 out of 88 chapters completed the CARE submission process.
- 72 (89%) achieved 100 percent.
- 60 (72%) achieved CARE Plus status.
- 11 chapters (12%) achieved less than 100 percent.
- Two chapters did not submit.
- Three chapters were inactive and were not required to complete the CARE survey.

### Chapters That Achieved 100 Percent CARE, as of January 31, 2023:

Capital Region	Hawaii	Pittsburgh
Greater Birmingham	Mid New Jersey	Puerto Rico
Greater Boston	Mississippi	San Diego
Greater Twin Cities	Northeast Wisconsin	Southern Connecticut

### Chapters That Achieved 100 Percent CARE and CARE Plus, as of January 31, 2023:

Ann Arbor	Fort Worth/Mid-Cities	New York City
Austin	Golden Gate	North Dakota
Baton Rouge	Greater Atlanta	Northeast Florida
Bay Colonies	Greater Cincinnati	Northern New Jersey
Buffalo Niagara	Greater Cleveland	Orange County
Cascadia	Greater Las Vegas	Puget Sound
Central Florida	Greater Philadelphia	Research Triangle Area
Central Indiana	Greater Richmond	Rochester
Central Iowa	Hawkeye	Rocky Mountain
Central Massachusetts	Houston	Sacramento
Central New York	Kansas City	San Antonio
Central Ohio	Kentuckiana	Smoky Mountain
Central Oklahoma	Long Island	South Carolina
Central Pennsylvania	Los Angeles	South Florida
Charlotte Area	Madison Area	Southeastern Wisconsin
Chicagoland	Maryland	St. Louis
Cuyahoga Valley	Memphis	Tulsa
Dallas	Metro DC	Valley of the Sun
Detroit	Nashville	West Michigan
Florida Suncoast	Nebraska	West Virginia

### Chapters That Did Not Achieve 100 Percent CARE, as of January 31, 2023:

Brazos Valley	Mississippi Valley	Treasure Valley
Greater Toledo	New Mexico	Utah
Lake Superior	Piedmont	Vermont
Maine	Southeastern Virginia	

### Active Chapters That Did Not Submit a CARE Submission, as of January 31, 2023

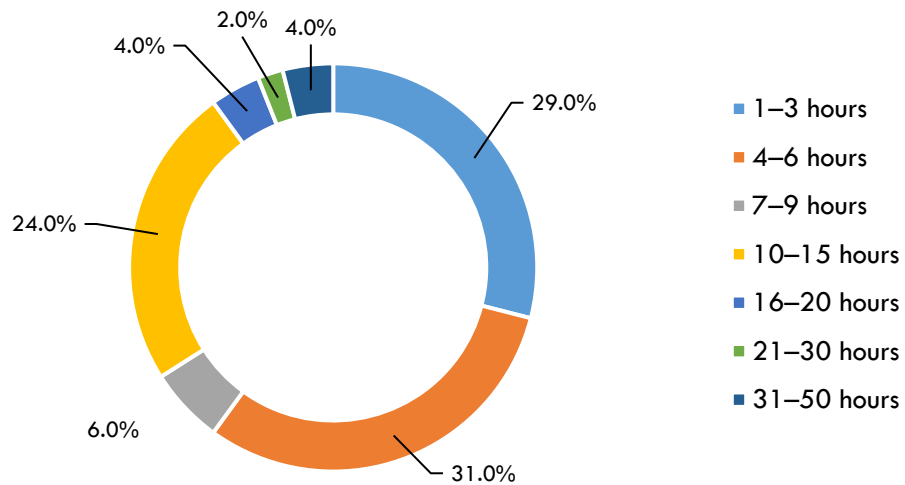
Chattanooga Area	New Orleans
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### Inactive Chapters, as of January 31, 2023:

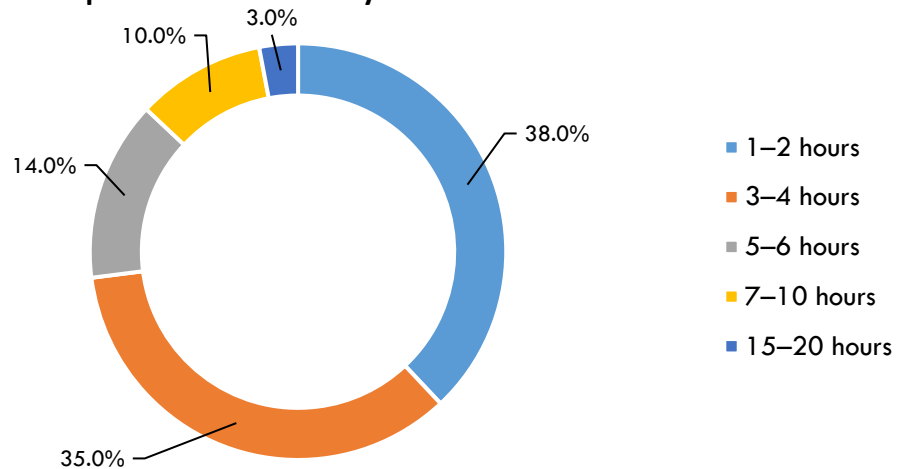
Arkansas	Eastern Pennsylvania	Valleys of Virginia
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## SECTION 3: ADMINISTRATION DATA AND COMPONENTS

**How long did it take to gather information to complete the CARE submission?**



**How long did it take to complete the CARE survey?**



## SECTION 4: ANNUAL UPDATE INFORMATION

### BOARD OF DIRECTORS

When are your chapter board meetings typically held? (n=83)

	Count	Percentage of Sample Answered
Monthly	74	89%
Bimonthly (occurring every two months)	3	3.6%
Quarterly	2	2.4%
Other	4	5%

Does your chapter pay for ATD membership dues for one or more chapter board members? (n=83)

	Count	Percentage of Sample Answered
Yes	47	56.6%
No	36	43.4%

When do your incoming board members **officially** begin their terms? (n=83)

	Count	Percentage of Sample Answered
First quarter (January through March)	73	88%
Second quarter (April through June)	0	0
Third quarter (July through September)	8	9.6%
Fourth quarter (October through December)	2	2.4%

### GOVERNANCE

What types of insurance coverage does your chapter have? Select all that apply. (n=75)

	Count	Percentage of Sample Answered
Directors' and officers' liability insurance	58	77.3%
Event-based insurance coverage	12	16%
General liability	44	58.6%
Professional liability	7	9.3%

Is your chapter incorporated? (n=83)

	Count	Percentage of Sample Answered
Yes	64	77%
No	19	23%

### FINANCE

Does your chapter pay for any administration help, such as a management firm or other administrative service? (n=83)

	Count	Percentage of Sample Answered
Yes	46	55.4%
No	37	44.6%

**MEMBERSHIP**

What was your chapter's average membership number for 2022? (n=83)

	Count	Percentage of Sample Answered
0–49	23	27.8%
50–99	22	26.5%
100–149	14	16.8%
150–199	11	13.2%
200–249	6	7.2%
250–299	5	6%
300–349	2	2.5%

Did your chapter raise dues in 2022? (n=83)

	Count	Percentage of Sample Answered
Yes	2	2.5%
No	81	97.5%

Did your chapter lower dues in 2022? (n=83)

	Count	Percentage of Sample Answered
Yes	80	96%
No	3	4%

Does your chapter plan to raise dues in 2023? (n=83)

	Count	Percentage of Sample Answered
Yes	7	8%
No	76	92%

How much are your regular membership dues? (n=83)

	Count	Percentage of Sample Answered
\$25–49	4	4.5%
\$50–74	28	34%
\$75–99	29	35%
\$100–124	8	10%
\$125–149	10	12%
\$150 or more	4	4.5%

Which of these dues categories does your chapter have? (n=83)

	Count	Percentage of Sample Answered
Group/corporate membership	66	79.5%
Senior member	16	19%
Student member	75	90%
Young professional	8	9.6%
Other	25	30%



How much are your **group or corporate** member dues? (n=66)

	Count	Percentage of Sample Answered
\$25–49	9	13.6%
\$50–74	22	33.4%
\$75–99	13	19.7%
\$100–124	8	12.1%
\$125–149	3	4.6%
\$150 or more	11	16.6%

How much are your **senior** membership dues? (n=16)

	Count	Percentage of Sample Answered
\$0–24	2	12.5%
\$25–49	6	37.5%
\$50–74	7	44%
\$75–99	1	6%

How much are your **student** membership dues? (n=75)

	Count	Percentage of Sample Answered
\$0–24	10	13.3%
\$25–49	43	57.3%
\$50–74	18	24%
\$75–99	3	4%
\$100 or more	1	1.4%

How many student members does your chapter have? (n=75)

	Count	Percentage of Sample Answered
Have a student rate but no student members	9	12%
1–9	53	70.6%
10–19	12	16%
20–29	0	0
30 or more	1	1.4%

Which of these are requirements for a student to get the student membership rate? (n=75)

	Count	Percentage of Sample Answered
Attend an accredited university or college	40	53.3%
Demonstrate they are taking classes in a talent development-related field	17	22.6%
Demonstrate they are in a degree program in a talent development-related field	16	21.3%
Take a minimum number of credit hours	13	17.3%

How much are your **young professional** dues? (n=8)

	Count	Percentage of Sample Answered
\$25–49	4	50%
\$50–74	2	25%
\$75–99	2	25%

Does your chapter provide ATD members a discount on chapter membership? (n=83)

	Count	Percentage of Sample Answered
Yes	27	32.5%
No	56	67.5%

What is the percentage of your discount? (n=27)

	Count	Percentage of Sample Answered
1–9	0	0
10–19	14	51.8%
20–29	6	22.2%
30 or more	7	26%

## PROGRAMMING

When are most of your regular programs held? (n=82)

	Count	Percentage of Sample Answered
Morning	16	19.5%
Lunchtime	29	35%
Afternoon	3	.4%
Evening	30	40%
Other	4	5.1%

What is the average number of people at your regular monthly chapter meeting? (n=81)

	Count	Percentage of Sample Answered
1–19	47	58%
20–39	33	40.7%
40–59	1	1.3%
60 or more	0	0

What is the approximate registration fee for a **chapter member** to attend a chapter program? (n=82)

	Count	Percentage of Sample Answered
Free	51	62.2%
\$1–9	2	2.4%
\$10–19	14	17%
\$20–29	11	13.5%
\$30 or more	4	4.9%

What is the approximate registration fee for a **nonmember** to attend a chapter program? (n=82)

	Count	Percentage of Sample Answered
Free	1	1.2%
\$1–9	4	4.8%
\$10–19	36	44%
\$20–29	25	30.5%
\$30–39	9	11%
\$40 or more	7	8.5%

What is the registration fee for a **chapter member** to attend a chapter-sponsored conference? (n=59)

	Count	Percentage of Sample Answered
Free	14	23.7%
\$1–49	13	22%
\$50–99	10	17%
\$100–149	4	6.7%
\$150–199	9	15.3%
\$200 or more	9	15.3%

What is the registration fee for a **nonmember** to attend a chapter-sponsored conference? (n=59)

	Count	Percentage of Sample Answered
Free	9	15.3%
\$1–49	13	22%
\$50–99	8	13.6%
\$100–149	6	10%
\$150–199	9	15.3%
\$200–249	5	8.5%
\$250 or more	9	15.3%

## **COMMUNICATION**

Which of the following social media channels does your chapter have? (n=82)

	Count	Percentage of Sample Answered
Facebook	60	73%
Instagram	18	22%
LinkedIn group	79	96.3%
Twitter	36	43.9%
YouTube	16	19.5%
Blog	4	4.8%
Other	5	6%

## SECTION 5: FOUNDATIONAL ELEMENTS ACHIEVEMENT DATA

### BOARD OF DIRECTORS

- 1.1 Chapter submits an incoming 2023 board roster using the Excel template. (n=83)

	Count	Percentage of Sample Answered
Achieved	83	100%
Nonachieved	0	

- 1.2 The chapter board meets at least once per quarter. (n=83)

	Count	Percentage of Sample Answered
Achieved	83	100%
Nonachieved	0	

- 1.3 Chapter board members maintain Power Membership (joint chapter/ATD national membership). (n=83)

	Count	Percentage of Sample Answered
Achieved	82	98.7%
Nonachieved	1	1.3%

- 1.4 Chapter maintains written position descriptions for elected members. (n=83)

	Count	Percentage of Sample Answered
Achieved	83	100%
Nonachieved	0	

### GOVERNANCE

- 2.1 The chapter created and submitted a 2023 operational plan that includes annual goals, communication/marketing strategy, recruitment/retention strategy, and succession planning. (n=83)

	Count	Percentage of Sample Answered
Achieved	83	100%
Nonachieved	0	

- 2.2 The chapter's mission, vision, and bylaws align with those of ATD, and the chapter meets the ATD branding guidelines. (n=83)

	Count	Percentage of Sample Answered
Achieved	83	100%
Nonachieved	0	

- 2.3 The chapter complies with federal and state reporting requirements. (n=83)

	Count	Percentage of Sample Answered
Achieved	83	100%
Nonachieved	0	

- 2.4 The chapter members participate in the nomination and election of the chapter board. (n=83)

	Count	Percentage of Sample Answered
Achieved	82	98.7%
Nonachieved	1	1.3%

## FINANCE

- 3.1 Chapter must upload its most recent balance sheet and income statement through the survey submission site by January 31, 2022. (n=83)

	Count	Percentage of Sample Answered
Achieved	83	100%
Nonachieved	0	

- 3.2 The chapter board develops and approves an annual operating budget and makes it available to members. (n=83)

	Count	Percentage of Sample Answered
Achieved	83	100%
Nonachieved	0	

- 3.3 Chapter board has an internal or external financial review completed annually by a person or group not directly responsible for managing chapter finances. (n=83)

	Count	Percentage of Sample Answered
Achieved	81	97.5%
Nonachieved	2	2.5%

- 3.4 Confirm the chapter's EIN on file is accurate. (n=83)

	Count	Percentage of Sample Answered
Achieved	83	100%
Nonachieved	0	

## MEMBERSHIP

- 4.1 Please upload the 2021 Chapter Membership Roster as of December 31, 2021 (n=83)

	Count	Percentage of Sample Answered
Achieved	83	100%
Nonachieved	0	

- 4.2 The chapter board assesses its members' needs and satisfaction levels at least once per year. (n=83)

	Count	Percentage of Sample Answered
Achieved	83	100%
Nonachieved	0	

- 4.3 By December 31, 2022, the chapter achieves a minimum of 20 joint chapter/ATD members and 35 percent of the chapter's membership simultaneously. (n=83)

	Count	Percentage of Sample Answered
Achieved	75	90%
Nonachieved	8	10%

- 4.4 The chapter completes 10 joint membership activities of the chapter's choice. (n=83)

	Count	Percentage of Sample Answered
Achieved	80	96%
Nonachieved	3	4%

## **PROGRAMMING**

- 5.1 The chapter provides members with at least six professional development activities per year. (n=83)

	<b>Count</b>	<b>Percentage of Sample Answered</b>
Achieved	81	97.5%
Nonachieved	2	2.5%

## **COMMUNICATION**

- 6.1 The chapter maintains a current website with up-to-date information. (n=83)

	<b>Count</b>	<b>Percentage of Sample Answered</b>
Achieved	83	100%
Nonachieved	0	

- 6.2 The chapter disseminates a communication piece to members at least once a quarter, including chapter and ATD programs and initiatives. (n=83)

	<b>Count</b>	<b>Percentage of Sample Answered</b>
Achieved	81	97.5%
Nonachieved	2	2.5%

- 6.3 At least once per year, the chapter board shares information about membership numbers, financial performance, and progress toward annual goals with members. (n=83)

	<b>Count</b>	<b>Percentage of Sample Answered</b>
Achieved	79	95%
Nonachieved	4	5%

- 6.4 Board members hold, at minimum, an annual phone call with their chapter relations manager to identify opportunities for support. (n=83)

	<b>Count</b>	<b>Percentage of Sample Answered</b>
Achieved	83	100%
Nonachieved	0	

## SECTION 6: CARE PLUS ELEMENTS ACHIEVEMENT DATA

### BOARD OF DIRECTORS

1.1 The chapter provides a defined orientation/onboarding process for incoming board members. (n=82)

	Count	Percentage of Sample Answered
True	78	95%
False	4	5%

How is the board member onboarding delivered? (n=78)

	Count	Percentage of Sample Answered
Hybrid	42	53.8%
In-person	5	6.4%
Virtually	31	39.8%

Approximately what is the frequency of your board member onboarding? (n=78)

	Count	Percentage of Sample Answered
Annually	32	41%
As needed	44	56.4%
Monthly	1	1.3%
Quarterly	1	1.3%

In what month(s) does the board member onboarding occur? (n=78)

	Count	Percentage of Sample Answered
January	51	65%
February	21	29.9%
March	12	15.3%
April	9	11.5%
May	8	10.2%
June	11	14.1%
July	17	21.7%
August	12	15.3%
September	12	15.3%
October	24	30.7%
November	29	37.2%
December	38	48.7%

What kind of coaching/mentoring does the chapter provide board members? (n=78)

	Count	Percentage of Sample Answered
Board meetings, strategy session, and/or board retreat has time dedicated to board member coaching/mentoring.	72	92.3%
New board members shadow and/or attend board meetings prior to the start of their term.	62	79.5%
Onboarding materials made available to incoming positions	64	82%
Outgoing position mentors incoming position.	66	84.6%
President one-on-one	64	82%
President team (president, president-elect, past president)	47	60.2%

If "Other," briefly explain what type of coaching/mentoring does the chapter provide?

- Managing Director provides information, assistance, and support for all leadership team members.
- For an at-large member, the new member meets with various vice presidents to determine and select an area of interest.
- Current volunteers interested in board positions are encouraged (and funded) to attend ALC before their service.
- New board members are invited to the November and December board meetings.

Who leads the onboarding of new board member(s)? (n=78)

	Count	Percentage of Sample Answered
Board member role dedicated to onboarding	5	6.4%
Past President	1	1.2%
President	31	39.7%
President-elect	5	6.4%
Role predecessor	25	32%
Other	11	14.1%

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

- Managing director
- The outgoing vice president and/or current vice president they will report to, the president-elect
- The president, director of operations, and business manager
- Role predecessor and/or someone who served in the role previously (even if not immediately prior)

1.2 The chapter has a succession strategy for identifying and filling board member positions. (n=81)

	Count	Percentage of Sample Answered
True	6	7.4%
False	75	92.6%



Describe the elements of your succession strategy. Select all that apply. (n=75)

	Count	Percentage of Sample Answered
Has a nominating committee responsible for selecting board members	39	52%
Has board member dedicated to identifying future board members	25	33.3%
Has multiple touchpoints with prospects to keep them engaged and informed	60	80%
Maintains an ongoing list of prospective board members detailing the fit for a specific role and the individual's skills/traits	48	64%
Offers opportunities to attend board meetings to educate prospective board members on board activities	30	40%
Other	9	12%

If "Other," briefly describe the actions in your succession strategy:

- Conduct video interviews with candidates and two current executive board members.
- Create a dedicated webpage highlighting opportunities.
- Dedicate agenda items during several board meetings that focus on identifying new board members and allowing movement on the board to support personal growth.
- Engage with the Succession Planning Toolkit from ATD National.
- Ideally, recruit new volunteers from members who attended a few events and/or were interested in volunteering. Start the volunteers with smaller assignments and build to having them join as a volunteer on a vertical committee (membership team or Marcom team).
- Recruit and secure vice chairs for all areas with the expectation that vice chairs will succeed chair and allow time to learn the area before assuming chair role.
- Rely on a nominating committee, recruitment drive, and multiple touchpoints.
- Send targeted call-to-action emails to help promote and recruit volunteers to board positions and promote board positions on social media, particularly LinkedIn.

Does your chapter review its succession plan annually? (n=75)

	Count	Percentage of Sample Answered
Yes	73	97.3%
No	2	2.7%

1.3 The chapter has a volunteer recruitment strategy in place for positions supporting the board's work. (n=82)

	Count	Percentage of Sample Answered
True	74	90.2%
False	8	9.8%

The chapter volunteer recruitment strategy includes: (n=74)

	Count	Percentage of Sample Answered
Board is structured for succession planning	42	56.8%
Dedicated webpage highlighting opportunities	45	60.8%
Position dedicated to coordinating chapter volunteers	28	37.8%
Targeted outreach to prospective volunteers	64	86.4%
Volunteer job descriptions	45	60.8%
Volunteer marketing using the website, social media, and email	61	82.4%
Volunteer open house	12	16.2%
Volunteer recruitment goal included in annual goals and strategies	30	40.5%
Other	4	5.4%

If "Other," describe the elements of your recruitment strategy:

- At each chapter board meeting, we discuss membership and volunteer needs, create action plans, and identify specific members to contact for volunteer opportunities.
- At each chapter event, we announce volunteer opportunities.
- At each chapter event, we recognize volunteers for time, talent, and resources given to the chapter.
- Members self-identify their volunteering interests on our annual member survey.
- This year, we have asked each board member to identify an area where a volunteer can support them. Each board member will have a volunteer to assist them this year.
- We promote volunteer opportunities at meetings.

1.4 At least one board member (excluding paid administrators) attends a NAC area call. (n=80)

	Count	Percentage of Sample Answered
True	76	95%
False	4	5%

1.5 The chapter had board member(s) attend ATD Chapter Leaders Conference (ALC). (n=82)

	Count	Percentage of Sample Answered
True	68	83%
False	14	17%

1.6 The chapter has an advisory board or council that involves past presidents in chapter activities. (n=78)

	Count	Percentage of Sample Answered
True	54	69%
False	24	31%

1.7 The chapter board meets to plan for the future strategically. (n=82)

	Count	Percentage of Sample Answered
True	79	96.3%
False	3	3.7%

## GOVERNANCE

- 2.1 The chapter board maintains and updates its standard operating procedures (SOPs) annually or as needed throughout the year. (n=77)

	Count	Percentage of Sample Answered
True	69	90%
False	8	10%

Which of the following does your SOPs include? (n=69)

	Count	Percentage of Sample Answered
CARE requirements	49	71%
Chapter background	27	39%
Conflict of interest policy	28	40.5%
Election of officers	53	76.8%
Job descriptions	62	90%
Mission and vision	55	80%
Organizational chart	34	49%
Past presidents	31	45%
Policies and procedures	55	80%
Strategic goals	55	80%
Other	7	10%

Please explain any additional items included in your chapter's SOPs:

- Board operations, governance, communications, membership, finances, and administrative.
- Bylaws, finance information, membership information, and procedures
- Chapter admin procedures, new board member onboarding, and monthly finance reporting
- Financial review, succession planning strategy, and chapter professional development
- Logins for various tools
- Parts of our bylaws

- 2.2 The chapter board reviews its bylaws annually, including a review of the bylaws as part of board member onboarding. (n=78)

	Count	Percentage of Sample Answered
True	72	92%
False	6	8%

- 2.3 The chapter makes board meeting minutes/summaries available to members. (n=80)

	Count	Percentage of Sample Answered
True	75	94%
False	5	6%

How are board meeting minutes/summaries made available to members? (n=75)

	Count	Percentage of Sample Answered
Emailed upon request	53	70.6%
Included in newsletter	1	1%
Posted on member-only website	44	58.7%
Posted publicly on website	3	4%
Other	3	4%

- 2.4 The board maintains a central repository or document library for archiving important chapter documents. (n=81)

	Count	Percentage of Sample Answered
True	81	100%
False	0	

How are board meeting minutes/summaries made available to members? (n=75)

	Count	Percentage of Sample Answered
Basecamp	4	5.3%
Dropbox	8	10.6
Google Drive	64	85%
Wild Apricot	43	57%
Other	12	17.1%

Please list any alternate platforms your chapter is using for documents:

- AirTable
- Box
- HINZtime
- Teamwork project management
- Microsoft 365
- Outlook for chapter emails
- SharePoint
- Slack

## FINANCE

- 3.1 The chapter has approximately three to six months of operating expenses set aside. (n=82)

	Count	Percentage of Sample Answered
True	78	95%
False	4	5%

- 3.2 The chapter board completes a risk assessment and reviews it annually. (n=76)

	Count	Percentage of Sample Answered
True	52	68.4%
False	24	31.6%

- 3.3 The chapter budgets to send board members to the ATD Chapter Leaders Conference (ALC) and/or covers the cost of ATD membership. (n=81)

	Count	Percentage of Sample Answered
True	72	89%
False	9	11%

How many chapter leaders are budgeted to attend ALC in 2023? (n=72)

	Count	Percentage of Sample Answered
0	1	1.3%
1	14	19.4%
2	23	32%
3	12	16.6%
4	4	5.6%
5	10	13.9%
6+	8	11.2%

- 3.4 The chapter's partnership strategy identifies, recruits, and maintains partnerships to support chapter programming and operations. (n=80)

	Count	Percentage of Sample Answered
True	66	82.5%
False	14	17.5%

If "True," please select the type of partner(s) the chapter works with. (n=66)

	Count	Percentage of Sample Answered
Other ATD chapter(s)	51	77%
Higher education	34	5.5%
Content provider/LMS	17	25.7%
Other professional association(s)	40	60%
Business(s) or nonprofits(s)	44	66.7%
Other	2	3%

- 3.5 The chapter has sponsors to support chapter programming and operations. (n=80)

	Count	Percentage of Sample Answered
True	63	78.8%
False	17	21.2%

If "True," please select the type of sponsor(s) the chapter works with. (n=63)

	Count	Percentage of Sample Answered
Local business(s)	50	79.3%
Higher education	23	36.5%
Learning/consulting agency	34	54%
Content provider/LMS	24	38%
Other	4	6.3%

## MEMBERSHIP

- 4.1 The chapter has a member/volunteer recognition or spotlight program. (n=80)

	Count	Percentage of Sample Answered
True	69	86.2%
False	11	13.8%

How does the chapter provide recognition? (n=69)

	Count	Percentage of Sample Answered
Hosts an appreciation event	28	40.5%
Provides an award or gift	36	52.2%
Recognizes at chapter event	41	59.4%
Recognize in chapter newsletter	38	55%
Spotlights on the chapter website and/or social media	43	62.3%
Other	9	13%

If "Other," describe the ways the chapter provides recognition:

- Contribution to a scholarship fund in the volunteer's name
- Permanent name badge for events

- Recognition of new/renewal members and volunteers at the beginning of chapter events
- Recognition with certificate and website listing (CNY Champions of Learning)
- Scholarship
- Virtual trophy case on website shows successful practices implemented by volunteer leaders

4.2 The chapter offers a job board, consultant referral service, resume workshop, or other service(s) not included in your chapter's member benefits. (n=79)

	Count	Percentage of Sample Answered
True	65	82.3%
False	14	17.7%

What service does your chapter offer? (n=65)

	Count	Percentage of Sample Answered
Consultant referral services	14	21.5%
Job board	61	94%
Resume review workshop	9	13.8%
Other	4	6%

If "Other," please list the services your chapter offers:

- Crowd-sourced member insights: Members submit questions via email using Wild Apricot, and we use Survey Monkey to collect responses. Past Q&A responses are hosted on a webpage.
- Partnership with a local university professor (Purdue University) where members dedicate time to giving feedback to students on their L&D or instructional design final projects
- Special interest group (SIG) for those in transition
- Talent development information and resources for inquiries

4.3 The chapter hosts an orientation for new members. (n=78)

	Count	Percentage of Sample Answered
True	54	69%
False	24	31%

How is the new member onboarding delivered? (n=54)

	Count	Percentage of Sample Answered
In-person	3	5.5%
Virtual	41	76%
Hybrid	10	18.5%

What is the program frequency? (n=54)

	Count	Percentage of Sample Answered
Annually	2	3.7%
Monthly	11	20.3%
Bimonthly	2	3.7%
Quarterly	12	22.2%
Twice a year	5	9.2%
On-demand	21	38.9%
Other	1	1.8%

If "other," please explain:

- New members receive an informational email.

What content is included in the onboarding? (n=54)

	Count	Percentage of Sample Answered
ATD overview	51	94.4%
Chapter background	46	85%
Member benefits	51	94.4%
Overview of events	51	94.4%
Power Membership	51	94.4%
Volunteer opportunities	50	92.5%
Other	9	16.7%

If "other," please describe additional onboarding content:

- Chapter leaders and industries served by chapter members
- Charitable opportunities
- Member directory for networking
- Member spotlight, sponsors, and resources
- Overview of all chapter programs, activities, and committees
- Personal welcome from the member experience team (phone, virtual, or email)
- Programming and sponsorships
- Referral source (find out how members learned about the chapter)
- Talent Development Capability Model™ and areas of interest/need
- Tutorial for navigating the website

4.4 The chapter tracks the retention rate of its members and determines a target retention rate to meet annually. (n=76)

	Count	Percentage of Sample Answered
True	42	55.3%
False	34	44.7%

4.5 The chapter makes its membership available on the ATD Store. (n=83)

	Count	Percentage of Sample Answered
True	76	91.5%
False	7	8.5%

4.6 The chapter creates awareness about volunteering for the chapter and open positions. (n=82)

	Count	Percentage of Sample Answered
True	81	98.7%
False	1	1.3%

Volunteer recruitment resources include: (n=81)

	Count	Percentage of Sample Answered
Announcements at chapter events	75	92.5%
Dedicated webpage with open volunteer positions	41	50.6%
Volunteer fair/event	8	9.8%
Volunteer job descriptions	48	59.2%
Volunteer marketing through social media and email	66	81.5%
Webinar	9	11.1%
Other	17	21%

- 4.7 The chapter achieves a joint chapter/ATD membership rate of 45 percent or higher while meeting the 20 joint member minimum. (n=81)

	Count	Percentage of Sample Answered
True	62	76.5%
False	19	23.5%

- 4.8 The chapter identifies those activities most impacting its joint membership rate. (n=78)

	Count	Percentage of Sample Answered
True	50	64.1%
False	28	35.9%

- 4.9 The chapter holds a membership campaign to recruit prospective members. (n=81)

	Count	Percentage of Sample Answered
True	67	82.7%
False	14	17.3%

## PROGRAMMING

- 5.1 The chapter offers a mentoring program/initiative for its members. (n=79)

	Count	Percentage of Sample Answered
True	22	27.8%
False	57	72.2%

How long is your program?

- 20-minute e-learning with twelve months of support
- Three, six, nine, or 12 months
- Five months for two cohorts
- Six weeks
- Indefinite
- Length varies based on the needs of the mentee
- Ongoing through our talent development essentials community of practice

How many mentees did you have? (n=22)

	Count	Percentage of Sample Answered
1–4	4	18.2%
5–9	6	27.3%
10–14	10	45.5%
15–19	0	0
20 or more	2	9%

How many mentors did you have? (n=22)

	Count	Percentage of Sample Answered
1–4	8	36.4%
5–9	8	36.4%
10–14	6	27.2%



5.2 The chapter uses the Talent Development Capability Model™ in program development. (n=81)

	Count	Percentage of Sample Answered
True	80	98.8%
False	1	1.2%

5.3 The chapter hosts MORE THAN six professional development events each year. (n=81)

	Count	Percentage of Sample Answered
True	76	93.8%
False	5	6.2%

How many networking events did the chapter hold in 2021? (n=73)

	Count	Percentage of Sample Answered
1–4	51	70%
5–9	9	12.3%
10–14	9	12.3%
15–19	2	2.7%
20 or more	2	2.7%

How many special interest groups (SIG) events did the chapter hold in 2021? (n=51)

	Count	Percentage of Sample Answered
1–4	9	17.6%
5–9	19	37.2%
10–14	10	19.6%
15–19	4	7.8%
20–24	6	11.8%
25 or more	3	6%

How many geographic interest groups (GIG) events did the chapter hold in 2021? (n=11)

	Count	Percentage of Sample Answered
1–4	8	73%
5–9	1	9%
10–14	2	18%

How many webinar events did the chapter hold in 2021? (n=68)

	Count	Percentage of Sample Answered
1–4	9	13.3%
5–9	21	30.8%
10–14	23	33.8%
15–19	3	4.4%
20–24	7	10.3%
25 or more	5	7.4%

5.4 The chapter partnered with other chapters to host a conference for its members and prospects. (n=77)

	Count	Percentage of Sample Answered
True	32	14.5%
False	45	58.5%

What was your conference theme?

- 50th Anniversary: Hello? Are You Out There?
- 75th Anniversary
- Agile. Bold. Prepared.
- Break Through to Excellence
- Coming Back. Coming Together. Moving Forward.
- Community, Connection, Conversation
- Expand Capabilities | Share Talent Development Prowess | Build Community | Look Forward Together
- Finding Your Learning Superpower
- Future Ready Now
- High-Impact Performance
- Leadership Development
- Learning Engagement and Influence for the Here and Now
- Learning Technology and Design
- Learntoberfest
- Let's Get Magical
- The MLGW Way Forward: An Unfolding Culture Change Journey Using Values and Focus to Achieve Organizational Results
- The Past, Present, and Future of Talent Development
- Reconnect & Reimagine
- ReVISIONing Learning
- Science of Hybrid: What Every L&D Professional Needs to Know
- Southwest Learning Summit
- Workshops: Practice to Theory, Creating Your Own Board of Directors; Navigating Change Management

How many people attended the conference? (n=32)

	Count	Percentage of Sample Answered
1–49	10	%
50–99	8	%
100–149	8	%
150–199	6	%

5.5 The chapter offers its study groups for the Associate Professional in Talent Development (APTD®) and/or Certified Professional in Talent Development (CPTD®). (n=81)

	Count	Percentage of Sample Answered
True	26	%
False	55	%

What type of study group does the chapter offer? (n=26)

	Count	Percentage of Sample Answered
APTD only	0	%
CPTD only	19	%
Both APTD and CPTD	7	%

On average, how many study groups did your chapter run in 2021? (n=7)

	Count	Percentage of Sample Answered
2	6	86%
3	1	14%

What is the average number of participants per study group? (n=7)

	Count	Percentage of Sample Answered
1–4	1	14%
5–9	1	14%
10 or more	5	72%

5.6 The chapter hosts its own awards program (n=77)

	Count	Percentage of Sample Answered
True	23	30%
False	54	70%

What awards categories do you provide? (n=23)

	Count	Percentage of Sample Answered
Company	8	34.8%
Consulting	3	13%
Individual	18	78.2%
Internship	1	4.3%
Professional Achievement	8	34.8%
Nonprofits	3	13%
Work teams	5	21.7%

If “Other,” please list the categories of the chapter’s awards program:

- Emerging leader spirit of the chapter
- Higher education
- Member of the year
- Recognition of member achievements (ATD certifications, *TD* magazine Up & Coming, local 40 under 40)
- Scholarships
- Talent Development Capability Model™ domains

## **COMMUNICATION**

6.1 The chapter communicates with its membership about non-programming information. (n=82)

	Count	Percentage of Sample Answered
True	77	94%
False	5	6%

What does the chapter use? (n=83)

	Count	Percentage of Sample Answered
Blog	14	16.9%
Email	57	68.6%
Facebook	50	60%
Instagram	15	18%
LinkedIn group	73	88%
Newsletter	50	60.2%
Twitter	22	26.5%
YouTube	11	13.2%
Video Blog	9	10.8%
Website	57	68.7%
Other	7	8.4%

What other communication tools does the chapter use?

- Members-only page
- Recorded videos through Vidyard and Lumen5
- Slack messaging

- 6.2 The chapter has a targeted communication strategy and plan (including social media) to communicate with chapter prospects and members. (n=81)

	Count	Percentage of Sample Answered
True	71	87.7%
False	10	12.3%

- 6.3 The chapter provides a member-only section through the chapter's website or social media. (n=82)

	Count	Percentage of Sample Answered
True	80	97.5%
False	2	2.5%

Select the information provided behind the member gateway or social media channels used. (n=80)

	Count	Percentage of Sample Answered
Board meeting minutes	47	58.8%
Event materials	54	67.5%
Governance documents	37	46.2%
Job board	45	56.2%
Member directory	63	78.8%
Mentoring	11	13.8%
Other	21	26.2%

- 6.4 The chapter participates in and promotes Employee Learning Week. (n=81)

	Count	Percentage of Sample Answered
True	54	66.6%
False	27	33.4%

What did your chapter do to support Employee Learning Week (ELW)? (n=54)

	Count	Percentage of Sample Answered
Hosted a themed event	23	42.5%
Hosted a webinar	11	20%
Organized a relevant communications plan	32	59.2%
Organized an awards program	2	3.7%
Received a state proclamation	3	5.5%
Other	13	24%

If "Other," please describe what your chapter did for ELW:

- Created a social media campaign with state civil service
- Curated a list of trainings, webinars, and other events
- Extended our membership drive with a 50% discount to encourage new members to join
- Hosted a virtual networking event with PowerPoint karaoke
- Hosted daily learning bites on LinkedIn each day
- Invited local organizations to send us photos and success stories from their ELW activities
- Participated with three chapters in a regional conference
- Sent toffee to each current member