1. **Administrative Component**
   1.1. The chapter’s mission, vision, and bylaws align with those of ATD. Additionally, the chapter meets the ATD brand identity guidelines.
   1.2. The chapter maintains written position descriptions for elected chapter board members.
   1.3. The chapter members participate in the nomination and election of the chapter board.
   1.4. The chapter creates an operational plan that includes but is not limited to:
      - annual goals
      - communication/marketing strategy
      - recruitment/retention strategy
      - succession planning strategy.
   1.5. The chapter submits a current board roster in Excel format with CARE submission and updates ATD Chapter Services as changes occur.
   1.6. The chapter submits a current membership roster in Excel format to ATD Chapter Services with CARE submission.
   1.7. The chapter board meets at least once per quarter and makes meeting minutes available to members.
   1.8. The chapter board completes a risk management assessment.

2. **Financial Component**
   2.1. The chapter complies with federal and state reporting requirements.  
      *Reminder: All chapters are required to file annual Form 990 or Form 990N with the IRS.*
   2.2. The chapter board develops and approves an annual operating budget and makes it available to members.
   2.3. The chapter board ensures an annual internal or external financial review is completed by an individual or group not directly responsible for the management of the chapter’s finances.  
      *Reminder: All chapters are required to provide its most recent balance sheet and income statement.*

3. **Membership Component**
   3.1. The chapter board assesses its members’ needs and satisfaction levels at least once per year.
   3.2. The chapter achieves by 12/31/19 a minimum of 20 joint chapter/ATD members (the original chapter chartering requirement) and 35 percent of the chapter’s membership. *(Please note: There is an aggregate chapter goal of 50 percent.)*
      - The chapter completes 10 joint membership activities of the chapter’s choice. For support, review the joint membership job aid.

4. **Professional Development Component**
   4.1. The chapter board members maintain joint chapter/ATD membership and participate in both annual chapter and ATD leadership development opportunities.
   4.2. The chapter provides at least six (6) professional development activities per year for members.

5. **Communication Component**
   5.1. The chapter maintains a current website with up-to-date information.
   5.2. The chapter disseminates a communication piece to members at least once per quarter that includes chapter and ATD programs and initiatives.
   5.3. The chapter board produces, and shares with members, an annual report that includes but is not limited to:
      - membership numbers
      - financial performance
      - progress toward annual goals.

For additional information about the CARE elements, please visit the CARE webpage on ATD’s Chapter Leader Community (CLC) website. *Reminder: All chapters are required to submit, along with the online survey, the following documents: 1) 2020 Chapter Board Roster, 2) 2019 Chapter Membership Roster, 3) 2020 Chapter Operating Plan, and 4) most recent Balance Sheet and Income Statement.*