CARE requirements planner 2019

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| Primary Chapter CARE contact | Chapter Leader’S name |

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| Element | Task | recommended start date | date completed |
| Administrative | Review vision, mission, and bylaws; adjust if needed | Q1 2019 | [Select Date] |
| Create annual operational plan | Q4 2018 | [Select Date] |
| Schedule board meetings (ensure minutes are available to members) | Q4 2018 | [Select Date] |
| Conduct risk management assessment | Q2 2019 | [Select Date] |
| Review board descriptions and elect a new board (create roster for ATD) | Q4 2018 | [Select Date] |
| Create membership roster for ATD | 12/31/19 | [Select Date] |
| Financial | Ensure chapter complies with federal and state reporting requirements | Q1 2019 | [Select Date] |
| Develop an annual operating budget (ensure budget is available to members) | Q4 2018 | [Select Date] |
| Conduct an annual financial review (internal or external) | Q3 2019 | [Select Date] |
| Membership | Conduct 10 joint membership activities | Review quarterly | [Select Date] |
| Conduct annual member survey | Q3 2019 | [Select Date] |
| Professional Development | Conduct professional development activities for members (six minimum) | Q4 2019 | [Select Date] |
| Ensure board maintains joint membership | Review quarterly | [Select Date] |
| Communication | Review and update website  | Review quarterly | [Select Date] |
| Conduct quarterly communication to members | Review quarterly | [Select Date] |
| Create and distribute the annual report | Q4 2019 | [Select Date] |

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| chapter relations manager | name | e-mail and Phone Number |
| National Advisor for chapters | Name | e-mail and Phone Number |

CARE joint membership activities

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| Primary Chapter CARE contact | Chapter Leader’S name |

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| **Activities: Select a minImum of 10** |
|  | DONE? |  | DONE? |
| Create Power Member page on chapter website | Yes \ No | Highlight Power Membership in chapter email communications | Yes \ No |
| Send quarterly email to prospective members promoting Power Membership | Yes \ No | Participate in the Chapter Membership on the ATD Store program | Yes \ No |
| Mention Power Membership at the start of each chapter event | Yes \ No | Promote Power Membership SIG and GIG meetings | Yes \ No |
| Detail Power Member benefits using rotating PowerPoint at events | Yes \ No | Request a list of ATD members quarterly to identify prospects | Yes \ No |
| Provide Printed Power Member collateral at each event | Yes \ No | Request joint membership calculation from CRM quarterly | Yes \ No |
| Include a Power Member section in the chapter newsletter | Yes \ No | Promote Power Membership at chapter special events | Yes \ No |
| Add Power Member logos to the chapter website | Yes \ No | Create a group or corporate Power Membership offering | Yes \ No |
| Put Power Member testimonials on the chapter website, newsletters, and so on | Yes \ No | Talk about Power Membership at each board meeting | Yes \ No |
| Post Power Member messages on social media | Yes \ No | Conduct new member orientations | Yes \ No |
| Share a joint membership best practice on a NAC area call, SOS, or at ALC | Yes \ No | Customize activities for your chapter | Yes \ No |

MONTHLY TIPS FOR CARE ACHIEVEMENT

* **January:** Finalize metrics from December 2018 (such as membership numbers and income and expenses) for inclusion in the chapter’s CARE submission. Collaborate with the entire chapter leadership team to complete your chapter’s 2018 CARE submission. Share information about annual CARE activities and responsibilities with the appropriate board members. Plan the chapter’s quarterly communication to members for Q1. Request a list of ATD members and a joint membership calculation from your CRM. Then, send a quarterly message to prospective members promoting Power Membership.
* **March:** Review the chapter’s CARE achievement status with the board.
* **April:** Finalize data from Q1 2019 for inclusion in the chapter’s CARE submission. Plan the chapter’s quarterly communication to members for Q2. Request a list of ATD members and a joint membership calculation from your CRM. Then, send a quarterly message to prospective members promoting Power Membership.
* **July:** Finalize data from Q2 2019 for inclusion in the chapter’s CARE submission. Plan the chapter’s quarterly communication to members for Q3. Request a list of ATD members and a joint membership calculation from your CRM. Then, send a quarterly message to prospective members promoting Power Membership.
* **September:** Identify your chapter’s CARE contact, who will coordinate the submission for the chapter.
* **October:** Finalize data from Q3 2019 for inclusion in the chapter’s CARE submission. Plan the chapter’s quarterly communication to members for Q4. Request a list of ATD members and a joint membership calculation from your CRM. Then, send a quarterly message to prospective members promoting Power Membership.
* **November and December:** Begin compiling and finalizing information for the chapter’s CARE submission, which is due January 31, 2020.