



Chapter Membership on ATD Store Preliminary Information and Guidelines

Good News & Introduction

Customers will be able to purchase chapter memberships on the ATD Store in the future! We're adding this functionality because of the requests and feedback we've received from our chapter leaders. To help you understand how this will work, we've prepared this document to provide an overview of the program and share detailed information for our pilot chapters.

Benefits for Participating Chapters

- All U.S. customers will be asked if they want to join a chapter when they sign up for ATD membership.
- Customers will be able to join as a Power Member in a single transaction, and the chapter will not have to collect Power Memberships on their own websites.
- Customers will have the ability to sync the dates of their ATD membership and their chapter membership.
- ATD will send renewal notices to Power Members, saving chapters administration time. Chapter memberships offered on the ATD Store are eligible for auto-renewal on the ATD Store.

Overview

- During the online membership join process, customers will be prompted to enter their zip code, which will identify the closest chapters. Customers also have the option to search for more than one chapter.
- Customers may purchase memberships to more than one chapter.
- ATD will process the financial transaction. Member information and chapter dues will be sent to the chapter.
- All chapters will be represented on the ATD Store. Customers will have the ability to request more information about chapters that are not selling membership via the ATD Store.
- Chapters will be able to renew their participation in the program annually.
- Chapters may opt out of the program with a 60-day written notice to their [chapter relations manager](#). Chapter memberships will be removed from the store within two business days, but residual payments may continue for up to three months.

How it will Work: System Information (Wild Apricot)

- Participating chapters will use the [Wild Apricot](#) platform because it is integrated with the ATD database.
- Chapter databases must include the following common contact fields (*Please note your data fields in Wild Apricot should be identical to those listed below.*):
 - User ID (assigned by Wild Apricot)
 - ATD Member ID (assigned and provided by ATD via a monthly report)

- Three Name Fields: First name, Middle name, Last name*
- Member Credentials (such as CPLP, SPHR, etc.)
- Title*
- Organization
- Email Address*
- Alternate Email Address
- Phone*
- Mailing Address
 - Primary Address Line 1*
 - Primary Address Line 2*
 - Primary City*
 - Primary State*
 - Primary Zip*
 - Secondary Address Line 1
 - Secondary Address Line 2
 - Secondary City
 - Secondary State
 - Secondary Zip
- The common contact fields (noted with an *) should be set as mandatory fields for all members in chapter databases. This information is *critical* to providing a positive customer experience, because ATD will use it to correctly match customers in both the ATD and Wild Apricot databases.
- Chapter databases may include additional customized common/membership fields, although these will not be used for the ATD Store membership set up.
- For convenience, chapters should direct Power Membership purchase inquiries to the ATD Store for processing, and collect only chapter-only membership dues at the chapter level.

Chapter Membership Information

- Chapters may offer four types of membership on the ATD Store (The ATD definition of each of these membership categories is provided in italics.):
 - Individual
 - Student (*enrolled in a minimum of 12 credit hours per year or the equivalent of at least half-time at an accredited university or college or 2) an active ATD chapter student member*).
 - Young professional (*professionals 30 years of age or younger*)
 - Senior (*a new member at least 65 years of age or a continuing member 62+ years of age*.)
- Memberships purchased through ATD can be one, two, or three years in length.
- Memberships sold on the ATD Store will be eligible for the [Chapter Incentive Program](#) (ChIP) if the dues price is at or above the \$199 Power Member pricing threshold.
- Discounted renewal rates on chapter membership will not be offered via the ATD Store.
- Chapters will set rates for their membership types offered on the ATD Store once annually.
- Chapters may continue to offer chapter membership on their Wild Apricot sites.
- Members will not be charged an administrative fee to join via the ATD store.
- All chapter memberships purchased via the ATD Store will expire at month-end, except for memberships purchased on the first day of a month, in which case expiration will occur on the

last day of the following month. For example, a one-year chapter membership beginning August 5, 2015, would expire August 31, 2016. A chapter membership beginning April 1, 2015, would end March 31, 2016.

- Chapters will be notified within 15 minutes when a new member joins via the ATD Store. An automated email will be sent to the designated chapter email inbox at the time of purchase. In addition, weekly reports will be emailed to each participating chapter and will include information for any members who joined the chapter that week.
- So that new members can access their chapter benefits as soon as possible, chapters should add membership information into their Wild Apricot database within two business days. The end date entered for the chapter membership should match the ATD membership end date to ensure that both memberships are in sync for the customer.
- ATD will send chapter renewal notices to any member who joined as a Power Member via the ATD store (i.e., the renewal notice will include chapter and ATD membership information). ATD will not offer chapter-only memberships on the ATD Store nor send renewal notices to chapter-only members; this will be a chapter responsibility. Customers will have the opportunity to auto-renew their chapter membership when purchased on the ATD Store.
- Student memberships will be renewed at the regular member rate in the case that the student has graduated. If continuing as a student, the member can use the student membership type.
- Chapter or ATD membership may be prorated in some cases to ensure that the membership end dates align for the customer.

Financial Information

- Once a month, ATD will make a direct deposit to chapters of chapter membership dues purchased on the ATD Store. Chapters will receive back-up information for the deposit indicating which members have renewed or joined.
- ATD will pay all fees associated with the transaction (i.e., credit card, PayPal, etc.).
- Chapters should notify ATD immediately if bank account information changes during the year so that membership payments continue without interruption.
- Cancellations of chapter and ATD memberships purchased on the ATD Store will follow the ATD cancellation policy. **ATD cancellation policy:** Cancellation requests should be sent to customercare@td.org. A prorated refund will be processed to the original credit card or by return check to the original check issuer if at least 31 days of membership remain on the account.
- If a chapter membership purchased on the ATD store is cancelled, and the membership funds were already sent to the chapter, ATD will withhold equivalent funds from the chapter's next direct deposit. The chapter point of contact will be notified in the event of a cancellation. If no chapter memberships are sold the following month, ATD will withhold money from the chapter's next membership deposit or the quarterly ChIP payment, whichever comes first.

For Chapters not on Wild Apricot/Non-participating Chapters

- Customers will have the ability to request additional information from non-participating chapters during the checkout process on the ATD Store.
- When requesting more information, the customer will submit their email address to ATD, which will generate an automated email with a link to the chapter's website. Chapters will be notified via email about the customer inquiry.

Please note, as ATD develops and launches the program, there may be amendments to the information detailed above. ATD will provide timely updates as this program takes shape.

Questions? Contact your [chapter relations manager](#).