



2009 CORE Submission Summary

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(Chapters reporting on the 2008 calendar year)

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If you have any questions regarding the 2009 CORE Submission Summary, please contact your chapter coach:

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Section 1: Executive Summary

Submission Results

As of the CORE submission deadline date (1/31/09)

- 123 out of 129 chapters completed the CORE submission process
- 82 chapters (63 percent) were compliant
- 42 chapters were not compliant
- 6 chapters did not submit any information



Compliance Data

The 123 submitting chapters self-evaluated their percentage of compliance in the 18 elements.

1. Highest percentage in compliance

Element Number	Element Description	Percentage of Chapters Evaluating at 100% Compliance
1.1	Mission, vision, and bylaws align with National	98.3%
1.2	Maintains written position descriptions	97.5%
1.6	Submits current membership roster	97.5%
2.1	Complies with federal and state reporting requirements	97.5%
5.1	Maintains current and up-to-date website	97.5%

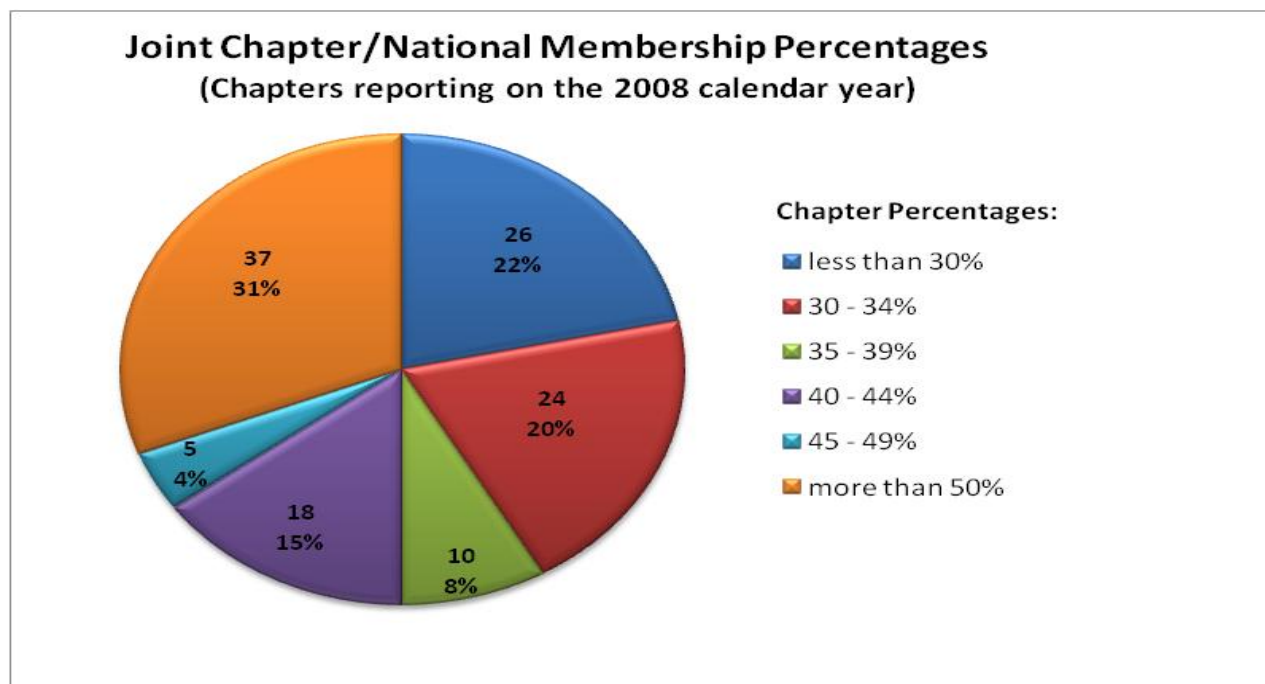
2. Lowest percentage in compliance

Element Number	Element Description	Percentage of Chapters Evaluating at 100% Compliance
1.8	Risk Assessment	82.1%
2.2	Develops annual operating budget	91.0%
2.3	Annual internal or external financial review	91.8%
3.2	Joint chapter/national membership	82.9%
5.3	Annual Report	86.9%

What does the CORE data tell us?

The following conclusions were drawn based on the collected CORE survey data:

- Based on the 2007 chapter CORE achievements, there were minimal differences in the number of compliant and non-complaint chapters.
- All three elements of the financial components were listed in either the high or low percentages of compliance. Chapters understand the need to comply with their federal and state reporting requirements yet they are not creating an annual operating budget or conducting a financial review. The ASTD finance toolkit provides an abundance of information as well as templates to assist chapters with these requirements.
- Though many chapters struggle meeting the joint chapter and national membership requirement, 78% of the 123 chapters that submitted were CORE compliant. Of these chapters, 31% were at least at 50% joint chapter and national membership. The average joint membership was 39%; half of the chapters had 40% or above. Only three chapters didn't meet CORE because of the joint membership requirement, and those percentages were close to the 30% requirement.
- Of the small and medium-sized chapters that reported less than 30% joint membership, the chapters needed an average of 11 more joint members to meet the requirement.
- Based on compliance percentages, along with the comments offered throughout the survey, it appears chapters understand the importance and benefit in the CORE process and are striving to be compliant with ASTD guidelines. The abundance of resources available to chapters on the chapter leader community were mentioned several times and are being used by chapters to identify best practices for accomplishing and tracking CORE compliance.



Section 2: Chapter Results

As of the CORE submission deadline date (1/31/09)

- 123 out of 129 chapters completed the CORE submission process
- 82 chapters (63 percent) were compliant
- 42 chapters were not compliant
- 6 chapters did not submit any information

Chapters achieving 100% CORE, as of 1/31/09 deadline

Alaska	Maryland
Albuquerque	Memphis
Ann Arbor	Metro DC
Arkansas	Miami
Austin	Mid New Jersey
Baton Rouge	Middle Tennessee
Bay Colonies	Midlands
Big Sky	Mississippi
Brazos Valley	Mt. Diablo
Cascadia	NC Research Triangle Area
Central Florida	NE Oklahoma
Central Iowa	NE Wisconsin
Central Massachusetts	Nebraska
Central Missouri	New Hampshire
Central New York	New Orleans
Central Ohio	New York Metro
Central Oklahoma	Niagara Frontier
Central PA	Northeast Ohio
Charlotte Area	Northern New Jersey
Corpus Christi	Northern Rockies
Dallas	Puerto Rico
E. North Carolina	Puget Sound
Eastern Pennsylvania	Reading Area Trainers Org
Emerald Coast Chapter	Sacramento
Fargo/Moorhead	San Diego
Florida Suncoast	SC Upstate
Fort Lauderdale	Smoky Mountain
Genessee Valley	South Central Michigan
Golden Gate	South Central Wisconsin
Greater Atlanta	Southeast Wisconsin
Greater Chattanooga	Southeastern Virginia
Greater Cleveland	Southern Connecticut
Greater Las Vegas	Southwest Florida
Greater Richmond	Springfield
Greater Toledo	Tallahassee
Houston	Tucson
Hudson Mohawk	Utah
Inland Empire	Valleys of Virginia
Inland Northwest	Vermont
Kansas City	West Texas
Los Angeles	Westchester

Non-complaint chapters, as of 1/31/09 deadline

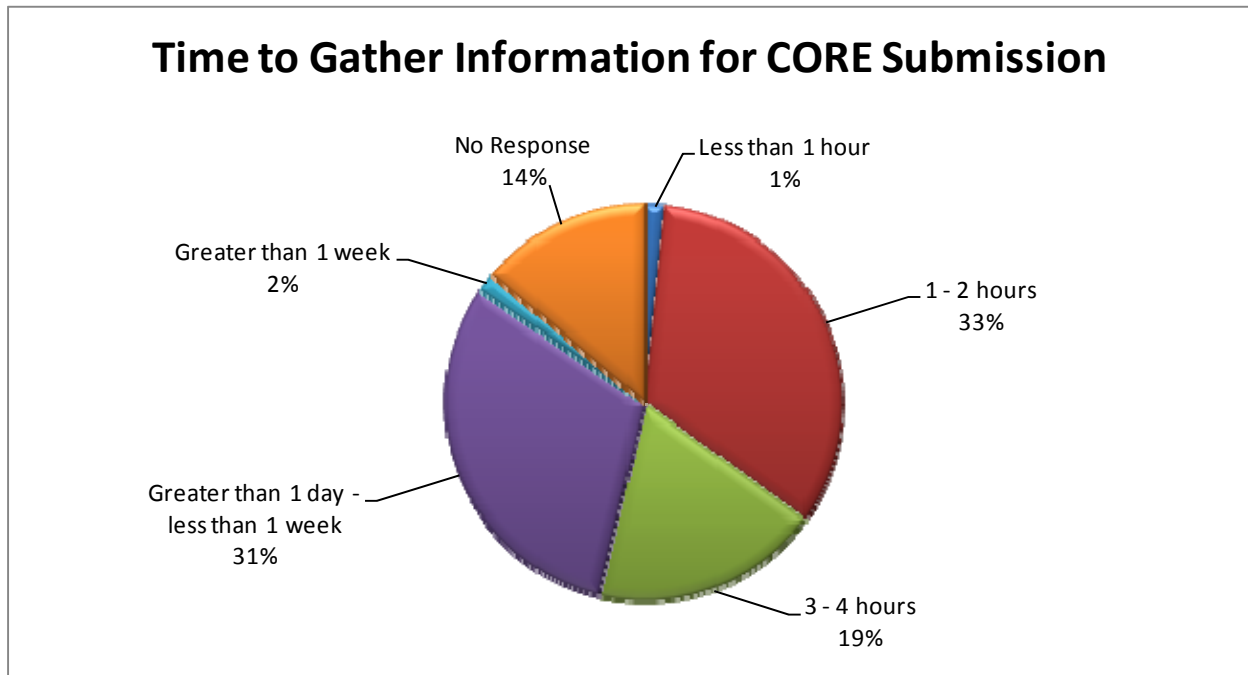
Central Illinois	Northwest Wisconsin
Central Indiana	NW Arkansas
Chicagoland	Orange County
Ft. Worth	Philly (Philadelphia)
Great Plains	Piedmont
Greater Cincinnati	Pikes Peak
Greater Detroit	Pittsburgh
Hawaii	River Cities
Hawkeye	Rock Valley
Heart of Illinois	Rocky Mountain
Kentuckiana	San Antonio
Lake Superior	Sierra Nevada
Lincoln	Southern Tier
Long Island	Space Coast
Maine	St. Louis Metro
Massachusetts	Treasure Valley
Mississippi Valley	Twin Cities
NE Wisconsin	Upper Michigan
North Alabama	Valley of the Sun
North Louisiana	West Virginia
Northeast Florida	Western Ohio

Non-submitting chapters, as of 1/31/09 deadline

Connecticut	Michiana
Eastern Idaho	Pensacola
Greater Birmingham	Silicon Valley

Section 3: Administration Data and Components

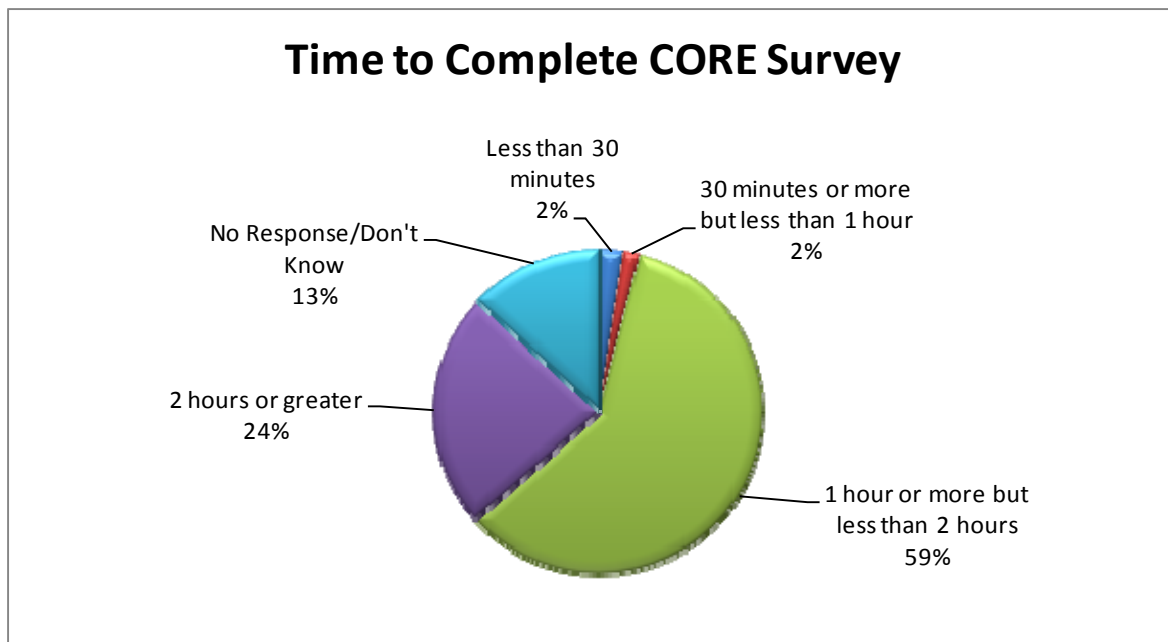
How long did it take to gather information to complete the CORE submission?



Best Practices Noted in the Comments:

- I thought it was simple, yet thorough and easy to complete. It took minimal time to compile data and complete because I was already familiar with what was required and have maintained appropriate data through the year.
- The process is easy enough if you have all the required information. The 2009 CORE Submission Worksheet helped a lot.
- I think the 2009 CORE Submission Worksheet is very complete and helpful for us as a guide.

How long did it take to complete the CORE submission?



Comments Noted in Survey:

- The on-line survey was easy to complete.
- Online process simplified submission; improved over manual process.
- Easy to use when you know ahead of time what information to have ready.
- Once all of the information was gathered the process was simple.

Section 4: Annual Update Information

Is your chapter incorporated?

	Count	% Sample Answered
Yes	57	47.5%
No	63	52.5%
Don't Know	3	N/A

Does your chapter pay for any administrative help, such as a management firm, or other administrative service?

	Count	% Sample Answered
Yes	49	40.8%
No	71	59.1%
Not Answered	3	N/A

Approximately, what was your chapter's 2008 gross revenue from all sources (dues, programs, sponsorships, etc.)? NOTE: This information is needed for ASTD tax reporting to the IRS and will not be shared.

	Count	% Sample Answered
Less than \$10,000	46	
\$10,000 to \$24,999	34	
\$25,000 to \$49,999	19	
\$50,000 to \$100,000	12	
Over \$100,000	4	
Didn't answer	4	N/A

How many chapter members do you currently have?

	Count	% Sample Answered
Less than 100	64	53.3%
101-300	40	33.3%
301 and greater	16	13.3%
Not Answered	3	N/A

In 2008, what happened to your chapter membership numbers?

	Count	% Sample Answered
Increased	61	50.8%
Decreased	37	30.8%
No Change	22	18.3%
Not Answered	3	N/A

Did your chapter raise dues in 2008?

	Count	% Sample Answered
Yes	19	15.8%
No	101	84.1%
Not Answered	3	N/A

Does your chapter plan to raise dues in 2009?

	Count	% Sample Answered
Yes	10	8.3%
No	110	91.6%
Not Answered	3	N/A

How much are your regular membership dues?

	Count	% Sample Answered
\$10 - \$40	17	14.1%
\$41 - \$70	64	53.3%
\$71 - \$100	31	25.8%
\$101 - \$175	8	6.6%
Not Answered	3	N/A

How much are your new membership dues?

	Count	% Sample Answered
\$0	1	0.8%
\$1 - \$20	17	14.1%
\$21 - \$50	5	4.1%
\$51 - \$75	8	6.6%
\$76 - \$100	3	2.5%
\$101 - \$145	5	4.1%
Not Answered	84	N/A

How much are your student membership dues?

	Count	% Sample Answered
\$1 - \$15	8	8.0%
\$16 - \$30	52	52.5%
\$31 - \$55	32	32.3%
\$56 - \$99	7	7.0%
Not Answered	24	N/A

How much are your senior membership dues?

	Count	% Sample Answered
\$1 - \$30	7	50%
\$31 - \$60	4	28.5%
\$61 - \$90	3	21.4%
Not Answered	109	N/A

How much are your corporate or group member dues per member?

	Count	% Sample Answered
\$1 - \$75	39	55.7%
\$76 - \$150	15	21.4%
\$151 - \$250	12	17.1%
\$251 - \$350	4	5.7%

Approximately how many total people attend your chapter events each month? Please include all chapter events such as monthly programs, Special Interest Groups (SIGs), etc.

	Count	% Sample Answered
15 or less	13	10.8%
16-30	50	41.6%
31-50	31	25.8%
51-100	22	18.3%
101-150	2	1.6%
150 or more	2	1.6%
Not Answered	3	N/A

What is the approximate cost of your monthly/regular programs?

	Count	% Sample Answered
\$0	8	8.3%
\$1 - \$15	21	21.8%
\$16 - \$30	44	45.8%
\$31 - \$65	23	23.9%

**We received 29 responses, ranging from \$95 - \$2000, that were not included when analyzing the above sample. One assumption is that these numbers may reflect a year's worth of programs being paid on one invoice, either through an individual or corporate membership structure.*

When are the majority of your regular programs held?

	Count	% Sample Answered
Morning	18	15%
Lunch	49	40.8%
Afternoon	2	1.6%
Evening	39	32.5%
Other, please specify*	12	10%

**Some chapters provided more than one answer for this question.*

Did your chapter have a half-day or full-day conference, seminar, or other large event in 2008?

	Count	% Sample Answered
Yes	82	68.3%
No	38	31.6%
Not Answered	3	N/A

Will your chapter have a half-day or full-day conference, seminar, or other large event in 2009?

	Count	% Sample Answered
Yes	100	83.3%
No	20	16.6%
Not Answered	3	N/A

In 2008, did your chapter partner with another membership organization? (SHRM Chapter, ISPI Chapter, OD Net, Chamber of Commerce)

	Count	% Sample Answered
Yes	82	68.3%
No	38	31.6%
Not Answered	3	N/A

In 2008, did your chapter partner with an educational institution?

	Count	% Sample Answered
Yes	66	55%
No	54	45%
Not Answered	3	N/A

When do your incoming board members OFFICIALLY begin their terms?

	Count	% Sample Answered
1 st Quarter (Jan-March)	93	77.5%
2 nd Quarter (Apr-June)	3	2.5%
3 rd Quarter (July-Sept)	19	15.8%
4 th Quarter (Oct-Dec)	5	4.1%
Not Answered	3	2.5%

Does your chapter pay for national ASTD membership dues for one or more chapter board members?

	Count	% Sample Answered
Yes	59	49.1%
No	61	50.8%
Not Answered	3	2.5%

Does your chapter budget to send board members to the ASTD Chapter Leaders Conference (ALC)?

	Count	% Sample Answered
Yes	97	80.8%
No	23	19.1%
Not Answered	3	2.5%

How many chapter leaders are budgeted to attend the ASTD Chapter Leaders Conference (ALC)?

	Count	% Sample Answered
1 – 5	75	77.3%
6 – 10	21	21.6%
10 or more	1	1%

Does your chapter have a CPLP study or special interest group?

	Count	% Sample Answered
Did in 2008 and planning for 2009	36	30%
Did not do in 2008, but planning for 2009	36	30%
Did in 2008, but not planning for 2009	2	1.6%
Did not do in 2008 and not planned for 2009	46	38.3%

Does your chapter have a GIG (geographic interest group)?

	Count	% Sample Answered
Did in 2008 and planning for 2009	15	12.5%
Did not do in 2008, but planning for 2009	18	15%
Did in 2008, but not planning for 2009	1	0.8%
Did not do in 2008 and not planned for 2009	86	71.6%

Does your chapter have any types of SIGs (special interest groups)?

	Count	% Sample Answered
Did in 2008 and planning for 2009	49	40.8%
Did not do in 2008, but planning for 2009	26	21.6%
Did in 2008, but not planning for 2009	4	3.3%
Did not do in 2008 and not planned for 2009	41	34.1%

Section 5: Element Compliance Data

1. Administrative Component

- 1.1 The chapter's mission, vision, and bylaws align with those of ASTD. Additionally, the chapter meets the ASTD brand identity guidelines.

	Count	Percentage
Not compliant/ Not answered	2	1.7%
100% Compliant	121	98.3%
Total	123	100%

- 1.2 The chapter maintains written position descriptions for elected chapter board members.

	Count	Percentage
Not compliant/ Not answered	3	2.5%
100% Compliant	120	97.5%
Total	123	100%

- 1.3 The chapter members participate in the nomination and election of the chapter board.

	Count	Percentage
Not compliant/ Not answered	4	3.3%
100% Compliant	119	96.7%
Total	123	100%

- 1.4 The chapter creates an operational plan that includes but is not limited to: annual goals, communication/marketing strategy, recruitment/retention strategy, and succession planning strategy.

	Count	Percentage
Not compliant/ Not answered	6	4.9%
100% Compliant	117	95.1%
Total	123	100%

- 1.5 The chapter submits a current board roster in Excel format with CORE submission and updates ASTD Chapter Services as changes occur.

	Count	Percentage
Not compliant/ Not answered	4	3.3%
100% Compliant	119	96.7%
Total	123	100%

1.6 The chapter submits a current membership roster in Excel format to ASTD Chapter Services with CORE submission.

	Count	Percentage
Not compliant/ Not answered	3	2.5%
100% Compliant	120	97.5%
Total	123	100%

1.7 The chapter board meets at least once per quarter and makes meeting minutes available to members.

	Count	Percentage
Not compliant/ Not answered	5	4.1%
100% Compliant	118	95.9%
Total	123	100%

1.8 The chapter board completes a risk management assessment.

	Count	Percentage
Not compliant/ Not answered	22	17.9%
100% Compliant	101	82.1%
Total	123	100%

2. Financial Component

2.1 The chapter complies with federal and state reporting requirements.

	Count	Percentage
Not compliant/ Not answered	3	2.5%
100% Compliant	120	97.5%
Total	123	100%

2.2 The chapter board develops and approves an annual operating budget and makes it available to members.

	Count	Percentage
Not compliant/ Not answered	11	9.0%
100% Compliant	112	91.0%
Total	123	100%

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.

	Count	Percentage
Not compliant/ Not answered	10	8.2%
100% Compliant	113	91.8%
Total	123	100%

3. The Membership Component

3.1 The chapter board assesses its members' needs and satisfaction levels at least once per year.

	Count	Percentage
Not compliant/ Not answered	4	3.3%
100% Compliant	119	96.7%
Total	123	100%

3.2 The chapter achieves minimum joint chapter/national membership level: 30% or 20 joint members (whichever is greater) by 12/31/08

	Count	Percentage
Not compliant/ Not answered	21	17.1%
100% Compliant	102	82.9%
Total	123	100%

4. Professional Development Component

4.1 The chapter board members maintain joint chapter/national membership and participate in both annual chapter and national leadership development opportunities.

	Count	Percentage
Not compliant/ Not answered	9	7.4%
100% Compliant	114	92.6%
Total	123	100%

4.2 The chapter provides at least six (6) professional development activities per year for members.

	Count	Percentage
Not compliant/ Not answered	6	4.9%
100% Compliant	117	95.1%
Total	123	100%

5. Communication Component

5.1 The chapter maintains a current website with up-to-date information.

	Count	Percentage
Not compliant/ Not answered	3	2.5%
100% Compliant	120	97.5%
Total	123	100%

5.2 The chapter disseminates a communication piece to members at least once per quarter that includes chapter and national programs and initiatives.

	Count	Percentage
Not compliant/ Not answered	7	5.7%
100% Compliant	116	94.3%
Total	123	100%

5.3 The chapter board produces, and shares with members, an annual report that includes but is not limited to membership numbers, financial performance, and progress toward annual goals.

	Count	Percentage
Not compliant/ Not answered	16	3.1%
100% Compliant	107	86.9%
Total	123	100%

Chapter Comments on Elements with the Lowest Compliance Percentage

Administrative Component: 1.8-Risk Assessment (82.1% Compliance)

- Have not yet conducted one, but plan to do it.
- The 2008 Board did not document a formal risk management assessment. Through the annual financial review, monthly board meetings, and chapter meetings the board has identified key risk areas such as insufficient D&O insurance.
- I'm not entirely sure what kind of risk assessment is meant here. I teach project management risk, so I'll be interested to know more about this issue.
- We are planning to engage the services of someone who can perform a risk management assessment for our non-profit organization.
- Haven't done this in the past and have a lot of energy to focus on rebuilding this chapter. We are looking at what it would take.
- We just brought on a new board, and we haven't had time to complete this. This will be done by the end of February.
- Last one was completed in 2007. Not aware since I took over in July that is was needed. Are planning one for 2009.
- Our board will make this a part of our 2010 planning meeting.
- We are currently working on this. The financial audit will be completed on Feb 6, 2009.
- Resources are limited but there are plans to create it.
- We are in the process of planning this step, projected to be done in April.
- It is not being completed at this time, but is being addressed by the board.
- This will be placed on the Board agenda for our next meeting so that action will be taken on this item.
- Currently our events are held at Broome Community College which holds it's own liability for any events held at that location. Our small chapter size does not support the possibility of incorporating at this current time.
- Will work towards compliance this year.
- We completed a risk assessment for 2007, identifying and mitigating all major risks. We did not complete one for 2008, primarily because we did not have enough involvement to do more than month-to-month activities. For 2009, we are actively recruiting more board members and leadership, and as President, I intend to develop a CORE calendar and to make assignments based on that calendar, to ensure we are CORE compliant for 2009.
- Just never thought about it.
- The chapter will complete this assessment this year and does not have one for 2008.
- We've never completed this but intend to in 2009 when new officers are elected in February.
- Board did not complete a risk management assessment. The 2009 board will complete all documentation required.

Membership Component: 3.2-Joint Chapter/National Membership (82.9% Compliance)

- We have only 29% national members at this moment. In October, our membership dropped significantly. We attribute this to the economic conditions and concerns of our area. We are looking to National ASTD for more help in the Power of 2 campaigns and are looking to make more offers to our members about surviving the economic downturn, which will help us sign up new members. Most importantly, we will be advocating and offering ONE COMBINED National/Chapter membership on the ASTD National web site and our Chapter website. We are considering a discount for combined memberships and hope ASTD National might also.
- We are working to increase this number by making personal telephone calls to current National members that are not local members, and we offer one free meeting to local members who become National members. We also post the "Power of 2" information on our Website.

Membership Component: 3.2-Joint chapter/national Membership (82.9% Compliance) - continued

- "Our numbers are lower because many of our members have limited dollars for association or development.
- We have been actively promoting the national membership at our meetings, on our web site and through marketing efforts.
- Also we have been actively pursuing national members for local membership.
- We will increase efforts for achieve the 30% or 20 joint members.
- We don't have sufficient data to confirm that we are less than the expectation of 30% or 20 joint members.
- Need more information on the benefits of national membership to sell this to our members.
- Because we just began rebuilding in 2008, we only had a small number of joint members. We will strive to achieve this goal by the end of 2009.
- We are currently at 26%. Membership and programming are looking at ways to increase joint membership.
- 31 members and 16 are National members. 52%. We have lost some National members due to job losses and companies reducing fees to groups. Plan would be to have ASTD out to a meeting again in 2009 (last time was 2007) for marketing and to find more non members for board and pay for membership.
- We are investigating the ASTD website resources for ideas on how we can increase our joint membership. We have also been in contact with other chapters for their ideas. We are currently working on a plan of tactics to help us increase our numbers.
- We continue to promote the benefits of joint membership and have increased our numbers but have yet to meet the 30% goal. We intended to intensify our recruitment efforts of chapter members and local national members who do not have joint memberships.
- We are reviewing status since the administration of membership has been taken over from former admins. We cannot afford to pay the other admins of the past.
- Our chapter is quite small (40 members); therefore, this is a difficult piece to comply with. However, we are promoting the "power of two" and considering offering a local discount if a national member. We are also actively recruiting national members who are not local chapter members to join our chapter.
- This is where we could use some help from national, since we are experts in training but not in marketing. At 219 joint members, we are still about 30 shy of 30%.
- Again as we lost key board members to relocation, our goal of focusing on recruiting slipped. We have a full board this year who will focus on recruiting and retention plus national membership.
- Fewer companies paying for dual membership. Professionals select one or the other. Chapter will continue to promote dual membership.
- We have instituted a joint national/local member rate. We will look for opportunities to attract those that already are National members to become local members. We will promote the benefits of National membership to our local members.
- At this time, our assessment of National membership is 15%. We will be working closely with ASTD National in 2009 for a more accurate accounting of our National membership. Once we have that assessment complete, we will be working to do more recruiting for the National Memberships. Our one major concern in this area for 2009 is cost due to the economy and many corporate budgets slashing the budget for memberships.
- We're making a greater effort to market ASTD national membership to our members by educating them about the benefits via our website and in our monthly program meetings.
- We have 44% of our 45 members that are also national members. We have marketed national membership to our chapter members, as well as all national members in our zip code and surrounding zip codes in the area to become members of our chapter. We have not been successful in gaining the 20 joint members, but will continue to campaign for more joint memberships. We have had this same issue for the last few years and hope to reach our goal in 2009. Our new VP of Membership has some new ideas for increasing our chapter and joint membership goals.
- We have never been aware of a requirement of this nature.

Communication Component: 5.3-Annual Report (86.9% Compliance)

- It is not an 'annual report' publication - it is a review in the newsletter that is continuously updated. We also publish reports on the website (agendas, minutes, ops plan) with two board retreats per year effectively updating the status in an electronically published report.
- We plan to do that this year, but it was not done by the previous board.
- This is something we will make available in 2009
- Last annual report was in September 08, but I was not aware of the 3 items to be included as a minimum. Since we are now going onto calendar year terms, I will have a report issued to members in February after board meeting.
- The board will make this part of its 2010 planning goals.
- We are creating a membership area for this.
- Annual report for 2008 is being prepared, will be shared with membership via website within next month.
- This will be placed on the agenda for our next Board meeting so that we can take action in 2009.
- did not do in 2008 - will try to do in 2009
- We have not in the past provided an annual report.
- The treasurer currently prepares a report for board members but this report has not been disseminated to membership at large. We plan to implement in 2009.
- We did not have sufficient leadership involvement to develop those for 2008. We are well on our way to putting a plan in place to make sure that we do this in 2009. We are actively recruiting more board members and leadership, and as President, I intend to develop a CORE calendar and to make assignments based on that calendar, to ensure we are CORE compliant for 2009.
- Didn't have the manpower to make this happen in 2008. We have every intention to do this in 2009.
- The 2008 Board did not complete an annual report. The 2009 Board will complete an annual report and disseminate it to membership and National ASTD.