



**The Policies for the Association for Talent
Development South Florida Chapter**

Information

The name of this organization is South Florida ASTD doing business as the Association for Talent Development (ATD) South Florida Chapter (hereinafter referred to as the “Chapter”).

This document was updated November 6, 2020

General Policies

Use of Chapter Name and Logo

Paid members may indicate their affiliation with the Chapter through the use of the Chapter name. The Chapter logo shall not be used by any member or group without specific approval of the Board of Directors.

Board of Director Policies

Prohibition of Payment

No member of the Board of Directors or Leadership Team will be paid for any services to the Chapter. In appreciation for services performed by a member of the Board or Leadership Team to an outside group and in the name of the Chapter, the recipients may make donations to the Chapter.

Lifetime Membership

The retiring President of the Chapter is granted lifetime membership upon completion of a full term of service.

Financial Policies

Financial Review

- 1) The Board will review balance sheet (year-to-date) and Profit & Loss (P&L) (year-to-date) and previous month's activities at each meeting.
- 2) Any Board member (Executive and Board of Directors) has the ability to audit the financial statements of the Chapter at any time by setting up a meeting with the VP of Finance at a mutually agreed upon date and time.
- 3) The Board will vote at the first meeting following the close of the Fiscal Year on the previous year-end results. Should the Board not accept the results, it will have 60 calendar days to remedy any errors in accounting of the Chapter's finances.
- 4) A full audit, conducted by a certified public accountant, is recommended every two (2) years, and may be undertaken more frequently if circumstances dictate (effective May 2017).

Financial Account Authority

The Board of Directors authorizes the President, President-Elect, and Vice President of Finance to be named on the account and complete financial transactions on behalf of the Chapter. This may include, but not limited to signing checks, debit transactions and withdrawals.

Financial Executive Authority

Any financial decisions and expenditures \$500 or above the approved budget must be approved by at least two members of the Executive Board and/or Vice-President of Finance. Any expenditures above \$500 must be approved by the Board of Directors.

Reimbursement

A Board member may not sign his or her own reimbursement check.

Payment and Credit Policy

Payments must be made at the time of purchase. Credits issued must be used within six months or the funds are absorbed by the Chapter as a donation.

Membership Policies

Membership Cancellation

A paid membership may be cancelled within the first 30 days, for any reason, unless a membership benefit has been used.

Membership Expiration

A paid membership expires the last day of the month, in which it was paid for, one or two year(s) after payment is received. Members are not provided a grace period past the expiration date.

Prorated Membership

Membership may be prorated to align with ATD (International) membership dates. And, organizational memberships may be prorated to add additional paid memberships to align with the existing terms.

Corporate Membership (updated 1/5/21)

1. "Seat" changes for active corporate memberships will be permissible at any time during the membership.
2. Prorated Refund of Professional Membership Contingent on Transfer to Corporate Membership Only. Members in good standing qualify for a prorated refund of their professional membership with the following requirements to be met:
 - Members that are at the 6 months or less mark in their professional membership qualify for a prorated refund upon request.
 - Members are transferring under a Corporate Membership and the corporate membership has been paid in full.
 - Members do not owe any outstanding invoices to the chapter.
3. **New** corporate members can be added to an active corporate membership bundle at any time. The \$50 membership will **not** be prorated.
4. Bundle members share the same renewal date, status, and membership level. The entire bundle is charged a single membership fee, which is paid by the bundle administrator.

Event Policies

Event Registration Terms and Rates

The Board of Directors sets the event registration fees for monthly professional development and networking events at the July Board of Directors meeting.

The Board of Directors sets the registration terms, including but not limited to early, regular and/or late registration days for monthly professional development and networking events.

Workshop fees may be set at this time or another point in the year, based on expenditures.

Workshop pricing and terms: the terms and fees are effective September 1 – August 30 of the upcoming year.

Member and Guest Event Cancellation

The Chapter requires an individual to cancel their event registration at least 24-hours in advance to issue a full refund. A credit will be issued with less than 24-hours notice; this credit must be used within six months, per our [Payment Policy](#), and can be applied towards a membership as well. It is the personal responsibility of the individual to use the credit. This policy will be reflected in the event confirmation and reminder emails as follows:

“If you are unable to attend the event, you must cancel your registration no later than 24 hours before the event for a full refund. A credit will be issued with less than 24-hours notice; this credit must be used within six months and can be applied towards a membership as well. To cancel your registration, please email operations@atdsfl.org or info@atdsfl.org.”

Event Cancellation or Reschedule by the Chapter

In the event the Chapter cancels an event, it will refund the full registration amount to each attendee and sponsor. The refunds will be processed within 3 business days from the cancellation day.

In the event the Chapter changes event location, day or time it will provide paid attendees with the opportunity to move their registration or be issued a refund.

Waiver of Event Registration Fees

The Chapter waives registration fees for the program presenter at each monthly professional development event.

The Board may vote to waive fees for the Board of Director’s, Leadership Team, and Volunteers who are supporting professional development or networking.

Members or guests may request event registration fees be waived or reduced through a vote of the Board of Directors.

President's Event Fee

The Chapter waives the registration fee for the President to attend all Chapter events. If the President is unable to attend, the President-Elect fees are waived. If neither the President nor the President-Elect are able to attend, the President appoints a Board of Director to attend and serve as the point of contact. The appointed Board of Director fees will be waived.

Website Privacy Policy

The Chapter respects the privacy of its members and visitors to the ATD South Florida website. The Chapter does not collect any information through the website without the knowledge of the member or visitor. The Chapter does not collect any information via cookies or other tracking means of a personal nature from website visitors. All personal information collected through the website is provided on a voluntary basis by the Chapter visitors through a visible means of data entry or collection.

One of the main objectives of the Chapter website is to encourage networking by Chapter members and site visitors. To support this networking and interaction, the Chapter may require that visitors provide information to access certain current and future areas of its website. This information may include name, email and postal addresses, phone numbers, and other information. Visitors provide this information on a voluntary basis to gain access to these areas.

Personal information collected through the Membership Application and Event Registration will be stored in the Chapter's general contact and membership database. The Chapter may use email or postal addresses for notifying members and visitors about upcoming events, new additions to the website, or other services offered by the Chapter. Member contact information is also made available through the Chapter Membership Directory, a current, searchable database of membership on the Chapter's website made available only to members of the Chapter.

The Chapter does not provide any contact information, such as email addresses, postal addresses, phone numbers, or other personally identifiable information that it collects on its website to any other individual or organization, other than ATD, for any purpose, including commercial.

Conference Attendance and Travel for Board of Director's and Leadership Team Members

ATD International Conference and Exposition

The Chapter pays for the president-elect's cost of attendance to the ATD International Conference. The Chapter covers the costs of conference registration, airfare, tolls/gas (if driving) ground transportation, hotel, and meals. In the event the president-elect is unable to attend the International Conference, the Chapter may send the president place with the same limitations on expenditures. This attendance to the conference is subject to a yearly Board vote, and is dependent upon the financial status of the Chapter.

If the President-Elect does not complete a full-term of service, the Board of Directors may vote for full reimbursement of expenditures covered.

ATD Leadership Conference (ALC)

The Chapter pays for the president and president-elect's cost of attendance to the ATD Leadership Conference. The Chapter covers the costs of conference registration, airfare, tolls/gas (not exceeding the cost of airfare), ground transportation, hotel, and meals.

The Chapter may send and cover the registration and travel expenditures for additional members of the Board of Directors, approved by the Board of Directors. The Chapter may cover the registration fee of any Leadership Team Members attending ATD Leadership Conference, with approval from the Board of Directors.

The attendance to the conference is subject to a yearly Board vote, and is dependent upon the financial status of the Chapter. If a Board Member or Leadership Team Member who attended the conference does not complete a full-term of service, the Board of Director's may vote for full reimbursement of expenditures covered.

