ATD is excited to have a partnership with Wild Apricot to provide membership, website, and event management services to ATD chapters at a discounted rate. This partnership decision was made based on feedback from chapter leaders requesting an easy-to-use, professional-looking, integrated management system for membership, website, and event registration services at an affordable price.

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ATD Chapter Group Pricing Details

1. **What is the relationship between Wild Apricot, ATD, and chapters?**
   ATD has negotiated a special pricing agreement for ATD chapters to use Wild Apricot services at a discounted rate. Chapters must contact ATD chapter services to secure this special rate; chapters are not eligible to receive the discount by contacting Wild Apricot directly. For support purposes, at least one ATD chapter services staff contact will be assigned to each chapter account under the ATD special pricing plan.

2. **My chapter already uses Wild Apricot, however, we would like to receive the discount pricing through ATD; is that an option?**
   Yes. Your chapter may renew its current Wild Apricot subscription plan through ATD to receive discount pricing. Please note that Wild Apricot will not permit existing subscription plans to be converted to ATD’s discounted pricing until the renewal date. To receive the discount pricing, your chapter must contact Natasha Porter, nporter@td.org at least two weeks prior to your renewal date.

3. **What is the cost to chapters under the ATD chapter pricing?**
   ATD has negotiated a special pricing of 20% off posted subscription prices. This is a 20% discount off the posted monthly rate, when paid annually. Chapters must contact Natasha Porter, nporter@td.org in ATD chapter services to secure this special rate; chapters are not eligible to receive the discount by contacting Wild Apricot directly.

4. **When does my chapter need to make the decision to move to Wild Apricot? Is there a deadline to be included under the ATD group pricing?**
   Your chapter can roll under the ATD chapter group pricing plan at any time.

5. **My chapter is ready to pay for our Wild Apricot subscription and receive full account access — what do we do now?**
   Your chapter should request a Wild Apricot invoice by completing this online form: http://forms.astd.org/view.php?id=44. Within two business days, you will receive an invoice via email from Wild Apricot (billing@wildapricot.com). After receiving the invoice from Wild Apricot, your chapter can either pay online or mail payment directly to Wild Apricot.

6. **Why does it take up to two business days to process an invoice — can my chapter just call Wild Apricot directly and pay now?**
   In order for your chapter to receive the chapter discount, Wild Apricot must receive confirmation from ATD that your chapter is eligible for the discount. This will ensure that non-ATD affiliated groups do not take advantage of this special pricing.

7. **Why isn’t my chapter paying ATD directly for our Wild Apricot subscription?**
   To streamline the process for chapters to subscribe and pay for Wild Apricot services, chapters will agree to the Terms of Use through Wild Apricot (not ATD), therefore payment must be submitted to them directly.

8. **Does my chapter need to sign an agreement with ATD?**
   No. Your chapter only needs to accept the Terms of Use through Wild Apricot. Once your
chapter completes the Wild Apricot Invoice Request, national ATD will communicate directly with Wild Apricot to be sure you receive the discount pricing.

9. **What are the Wild Apricot Terms of Use?**
   Click here to review the Wild Apricot terms of use.

10. **My chapter currently has a contract with another vendor. When can we cancel service/should we renew our contract?**
    ATD advises chapters to continue working with vendors until you have time to review and accept the Wild Apricot terms of usage and set up your new account features, minimizing down time for customers and chapter members.

**Wild Apricot Renewal Questions**

1. **What is the ATD chapter discount pricing?**
   ATD has negotiated special pricing of 20% off posted subscription prices. This is a 20% discount off the posted monthly rate, when paid annually.

2. **Can our chapter pay month-to-month and still receive the ATD chapter discount pricing?**
   The 20% discount applies only to annual plans. Wild Apricot does not offer discounts on monthly plans.

3. **Should my chapter renew directly with Wild Apricot?**
   Yes. Please submit your payment directly to Wild Apricot per the instructions provided on your invoice.

4. **Who do I contact if my chapter would like to change our subscription plan or renew with a different subscription plan than we had for 2012?**
   All changes to your subscription are handled directly by Wild Apricot. Please send all billing plan changes/requests/issues directly to billing@wildapricot.com.

5. **If we renew at one subscription plan and decide we want to change it mid-year, who do we contact? What charges will we incur?**
   If you decide to upgrade to a higher plan midway through your current billing cycle, you will only be charged a pro-rated upgrade fee. Please note, there are no refunds for downgrading to a lower plan mid-year. To make a change to your subscription plan, please contact Wild Apricot at billing@wildapricot.com.

6. **My chapter would like to cancel our Wild Apricot subscription, who should we contact?**
   Please send your cancelation request directly to billing@wildapricot.com.
General Wild Apricot Questions

1. **What is Wild Apricot?**
   Wild Apricot offers online membership software for small associations, non-profits, and clubs and provides services that assist with membership, website, event, and online fundraising management. To learn more, visit [www.wildapricot.com](http://www.wildapricot.com).

2. **What services are offered through Wild Apricot?**
   Wild Apricot subscription plans offer the following services ([click here for more details](#)):
   - **Membership Management**
     - Customizable online membership applications
     - Member directory
     - Automated membership renewals
   - **Website Management**
     - Easy website builder
     - Online communities
     - Secure access for editing
   - **Event Management**
     - Event registration
     - Online payments
   - **Donations (Fundraising) Management**
     - Online donation management
     - Donation gauge for your website

3. **Is it required for every chapter to use all services provided by Wild Apricot?** No. Although each service (membership, website, event, and donations management) is included in Wild Apricot subscription plans, it is not required for your chapter to use them all.

4. **If my chapter doesn’t want to use all Wild Apricots services initially, can we add services later?** Yes. Since your subscription plan will include all services, your chapter can begin using these features at any time at no additional cost.

5. **Is Wild Apricot Payment Card Industry (PCI) Data Security Standard (DSS) compliant?** Wild Apricot has not undergone a formal third-party audit to claim they are PCI compliant however they have conducted a self-audit and believe they meet the PCI requirements. Also, Wild Apricot does not store or process credit card payments; Wild Apricot transmits payments over a secure connection to the designated payment processor.

6. **If my chapter moves to Wild Apricot, will we be required to purchase our own SSL certificate?** No. Since the Wild Apricot payment processors are PCI compliant (PayPal, Google, etc.) your chapter does not need to purchase a separate SSL certificate.

7. **How can my chapter ensure that we are PCI Compliant?**
   Chapters that collect payments by credit card must ensure that they are Payment Card Industry (PCI) Compliant ([https://www.pcisecuritystandards.org/merchants/index.php](https://www.pcisecuritystandards.org/merchants/index.php)). The purpose of these standards is to protect the security of customers’ credit card data.
Here are some tips to ensure your chapter is PCI compliant:

a. Black out credit card numbers once processed so that they cannot be read.

b. Lock up all paperwork with credit card numbers.

c. Delete all emails once you have processed the credit card number.

d. Take all measures to ensure there is no permanent record of credit card numbers anywhere.

*If an unauthorized person obtains your member’s credit card number from the chapter and starts charging off of it, the chapter could be subject to a large fine and not be allowed to accept credit card payments.*

8. Are there ATD chapters currently using Wild Apricot that I could call for references or to ask questions? Yes. The following chapters are currently using Wild Apricot and may be contacted for more information.

   ATD Eastern Pennsylvania          ATD Greater Atlanta
   www.tdeasternpa.org               www.atdatlanta.org
   rickkerner@icloud.com             info@atdatlanta.org

   ATD Central Oklahoma             ATD Maine
   www.tdokc.com                    www.tdmaine.org
   contactus@tdokc.org              info@tdmain.org

   ATD South Florida                ATD Houston
   www.atdsfl.org                   www.tdhouston.org
   info@atdsfl.org                 drichardsatdnac@gmail.com

9. What are the storage limits within Wild Apricot?
   Storage limits vary according to your chapter’s subscription plan.

10. What type of technical support will be available for Wild Apricot?
   Wild Apricot provides technical support to chapters and offers a variety of videos, tutorials, job aids, and webcasts to help your chapter get up to speed. Access these resources here: http://help.wildapricot.com/display/DOC/Home.

11. Why type of support is available through ATD?
   ATD will continue to provide support regarding joint membership rosters, promoting chapter membership, and provide resources for populating ATD related-information on your chapter website. For support purposes, at least one ATD chapter services staff contact will be assigned to each chapter account under the ATD special pricing plan. For technical support and training, please contact Wild Apricot directly: http://help.wildapricot.com/display/DOC/Home.
12. Can we assign our own Wild Apricot account administrators?
Yes, your chapter may assign chapter board members administrative rights to your account. Wild Apricot recommends that your limit the amount of chapter board members who have full access rights to your account (the recommended number is 3-5). For support purposes, at least one ATD chapter services staff contact will be assigned administrator rights to each chapter account under the ATD special pricing plan.

13. Our board is very concerned about the privacy of information within our Wild Apricot contact database. Can you assure us that this information will not be used or accessed by ATD?
As part of ATD’s commitment to assist chapters with meeting the Chapter Affiliation Requirements (CARE) for joint chapter-national membership, ATD will invite your members to join ATD and will include them in occasional communications regarding ATD news, conferences, and content offerings. To give you an idea of what this may look like, current non-national chapter members receive around 6-8 communications per year.

14. My chapter needs assistance setting up our website, what resources are available?
   a. Chapters are encouraged to access the training videos, tutorials, and resources on the Wild Apricot website http://help.wildapricot.com/display/DOC/Home.
   b. Download a document with helpful tips from a chapter who has made the switch to Wild Apricot. (Thanks to Rick Kerner, Eastern PA, for coordinating this resource!)
   d. Additional assistance with migrating content from your website portal is available for a fee. Please contact your chapter relations manager to be connected with our recommended contractor, who is also a former chapter leader.
   e. ATD now has several ways to make processing ATD memberships easier for chapters. Click here for a job aid on how to collect and process joint membership payments as one bundle and information about how to process ATD memberships.

Wild Apricot Services (by module)

General Account Features

1. What credit card processing system does Wild Apricot use? Wild Apricot provides an integrated solution for online payments. This means that when people use online forms on your Wild Apricot website they can instantly and securely pay online using a credit card. Currently, Wild Apricot provides integration with the payment processing systems listed below. Please visit each vendor’s website to learn more about their charges and fees.
a. Authorize.net
b. PayPal Pro
c. PayPal Standard
d. Google Checkout

Click here for more information about credit card processing.

2. Does Wild Apricot download to QuickBooks? You can export invoice and financial information from Wild Apricot into a spreadsheet that you may later use in other financial programs (i.e. QuickBooks). Click here for more information about exporting invoices.

3. Does Wild Apricot have invoicing capability? All transactions in Wild Apricot (membership applications, renewals, and event registrations) automatically generate an invoice. For online transactions an invoice is generated automatically. For manual transactions (when an administrator adds an event attendee by hand) the administrator may generate an invoice. Click here for more information about invoices.

4. Which reports are available from the system? Wild Apricot offers several reports within each of its modules, including financial, event registration, member, and contact reports. Click here for a detailed listing of reports.

5. Is there an email marketing tool in the system? If so, is there tracking and analysis on open rate, bounces, etc.? Wild Apricot allows you to send email messages to all the contacts in your database. This “email blast” feature is commonly used to send out newsletters, event announcements, and regular chapter communications. Wild Apricot allows you to track the number of opened emails and/or number of times certain links in your message were clicked. Click here for more information about tracking emails.

6. Can ATD chapters participate in fundraising activities? ATD chapters are 501(c)(3) organizations and may participate in fundraising activities, however, there are additional requirements that must be followed. For instance, chapters need to submit paperwork to their state to solicit contributions and also need to provide a letter to all donors that give more than $250. It is recommended that ATD chapters do not collect funds and then pass them on to another charity. A good example of what is appropriate to solicit contributions for would be a chapter scholarship fund. For more information on fundraising requirements for 501(c)(3) organizations, please click here.

7. What does donations (fundraising) management provide my chapter? The donations (fundraising) management service provided by Wild Apricot allows chapters to easily accept online donations through a secure system and leverage your database of donors. Chapters could use this service for community involvement activities, to collect monies for scholarships, or to purchase CPLP-related resources.
8. **Does Wild Apricot have polls and survey capabilities?** Wild Apricot doesn’t currently have built-in polling/survey tools, but these can be easily integrated with a third-party service provider, such as PollDaddy. [Click here for more information on polls and surveys.](#)

**Events Module**

1. **Can the events module handle sessions or tracks?** Wild Apricot allows you to customize event registration forms for each event. This allows you to customize your monthly event registrations from your chapter’s annual conferences. [Click here for more information about customizing event registrations.](#)

2. **Does the events module handle promo or discount codes?** Yes, Wild Apricot allows you to create event registrations with a coupon code. [Click here for more information about event coupon codes.](#)

3. **Does the events module allow you to print name badges?** Wild Apricot doesn’t have a name badge feature; however, you may export event registration lists and create name badges in other software, including Microsoft Word.

**Membership and Contacts Module**

1. **What does the term “contact” mean within Wild Apricot?** Contacts are the people who interact with your chapter website. Anyone who registers for an event or applies to become a member will have a contact record created, which is associated with their email address. Administrators can also create a contact for someone to add to their mailing list as a prospect. Every member within your account is a contact; however, every contact doesn’t need to be a member.
   - All chapters who receive pricing under the ATD discount should maintain at least one current ATD chapter services administrator contact for support purposes.
   - It’s important that your chapter monitor the number of contacts and amount of file storage space in each year to better predict pricing for the next.

2. **Does Wild Apricot support individual and company/corporate membership types?** There are two types of membership levels within Wild Apricot.
   - a. Individual memberships
   - b. Bundle memberships (for companies or teams)

   Each membership level defines member access privileges, membership application and renewal fees and terms, eligibility for special pricing in events, inclusion into one or more member directories, and membership record fields. [Click here for more information about membership levels.](#)
3. **What shows in the member profile?** Each member (or contact) has their own record within the chapter’s Wild Apricot account. Both chapter administrators and the member can update and edit this record with certain security measures in place. The top of each profile lists key membership information, including membership level, status, date joined, and renewal date. Additional information can be added by the chapter and must be setup within the member database. [Click here for more information about member profiles.](#)

4. **Can we have “groups” by member type for easier sorting/management?** Wild Apricot allows chapters to organize members and contacts into groups such as board of directors and volunteer committees. These groups are independent of membership levels and can include members from different levels.

   These groups can be used in a number of ways:
   
   - Keep track of member participation in committees
   - Quickly selecting a group of members to email
   - Creating a website section with restricted access to a group.

   [Click here for more information about member groups.](#)

5. **How would you set up for New Members ($55) and Renewing Members ($45)?** To have your sign up price $55 and your renewal $45, you would set up your membership level with $45 as the level price. Then, create a mandatory extra-cost membership field and set it to be $10 and do not include it in renewals. This will add $10 to the application and make the sign up cost $55.

6. **Can a member’s photo be added to the directory?** Wild Apricot allows members and/or contacts to upload photos to their profiles within your chapter website. Members can also create photo albums within their profile which, depending on the level of access given, can be displayed to either everyone who views the member’s profiles, just members, or invisible to all users. [Click here for more information about member photos.](#)

**Website Module**

1. **How will our website be hosted? How will our URL/web address be determined?** Chapters have two options for establishing domain names:

   a. ATD can create and host the domain name for your chapter. This is available at no cost. Chapters currently on the portals may opt to keep their current web address.

   b. If your chapter currently has and owns its current web address, the chapter may set up the current domain and web address to point to its new Wild Apricot account. [Click here for more information about custom domain setup.](#)
2. Does Wild Apricot support custom backgrounds or do you have to use one of their templates? Wild Apricot comes with a wide variety of websites templates that give your website a professional look and feel without having to hire a graphic designer. Each theme can be customized to fit your chapter’s needs. Your chapter may also customize its website completely by providing its own HTML code. [Click here for more information about website themes.]

3. Does Wild Apricot have a fully integrated database on the website for the membership database? Wild Apricot allows you to create a member directory within your website. All information stored in the membership module is automatically linked to your chapter website to assist with creating the member directory. The chapter may choose to make its directory public or a members-only benefit. [Click here for more information about member directories.]

4. Is there a job board function and way to collect money? Wild Apricot does not have a specific job board area, however, your chapter may create a functional webpage to use as a job board. [Click here for more information about functional pages.]