

2020 ATD RTA Strategic Plan

Defined 1/18/2020 at Board Retreat

Reviewed/Finalized 1/23/2020

Review Cycle: *Monthly Board Meetings*

The strategic areas are aligned with the 5 elements of the ATD [Chapter Affiliation Requirements \(CARE\)](#).

1. Administrative Component (Primary: Carol, Ken, & Claudine)

Objective : *Ensure compliance with CARE and Strengthen the organization as a whole.*

| Goals | Strategies |
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| <p>A1. Maintain ATD Superstar Status (100% CARE compliance and 50% Power membership) by Dec 31, 2020</p> <p>Owner: Ken</p> | <p>A. <i>Compliance:</i> Create CARE 2020 Planning worksheet and post on google site</p> <p>B. <i>Compliance:</i> review CARE Planning worksheet at each board meeting and address any issues</p> <p>C. <i>Compliance:</i> a) Review & Revise Risk Assessment Plan and b) Create 2021 Strategic Plan</p> <p>D. Achieve 50% New Care + Requirements</p> |
| <p>A2. Promote volunteer success and retention to ensure at least 2 years of active membership.</p> <p>Owner: TBD</p> | <p>A. Define the roles/responsibilities needed to support the goal. See Director of Volunteers position description as a reference</p> <p>B. Define an “owner”</p> <p>C. Create written procedures for each volunteer role.</p> <p>D. Create a formal onboarding process for volunteers.</p> <p>E. Develop recognition program for volunteers.</p> <p>F. Develop/Implement standards for SIG’s to create consistency alignment with ATD Competency model and program topics.</p> |

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| <p>A3. Implement and market sponsorship program and achieve at least \$2000 from sponsorship endorsements.</p> <p>Owner: Ken</p> | <p>A. Define operating group to implement that includes at a minimum; communications, programs, membership and community relations,</p> |
| <p>A4. Use data (at a minimum from Wild Apricot, Level 1 evaluations and Google analytics) to help make data driven decisions.</p> <p>Owner: Claudine</p> | <p>A. Define Goals</p> |
| <p>A5. Create a sustainable Board Succession Plan by June 30, 2020.</p> <p>Owner: Carol</p> | <p>A. Confirm when current board members terms will expire and what roles will be open in 2021</p> <p>B. Review and revise as needed current board position descriptions.</p> <p>C. Define succession plan objectives and define specific steps to achieve objectives. See ATD Toolkit for suggested process</p> <p>D. Create an advisory board of pat board members to assist in recruiting.</p> |

2. Financial (Primary: Drew & Paige)

Objective *Maintain sufficient financial resources to support programs and operations.*

| Goals | Strategies |
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| F1. Ensure a balanced budget based on 2020 ATD-RTA budget line items. | <ul style="list-style-type: none"> A. Only include line items necessary to run the chapter. B. Quarterly review with each group on the board (comm, membership, etc.) to determine changes C. Report monthly to board and share at board meetings D. Provide standard report on plan vs. actual for membership to determine progress to goal |
| <p>F2. Set up autopay for renewal</p> <p>Owner: Paige</p> | <ul style="list-style-type: none"> A. Determine feasibility and ROI (possible issue on CHIP revenue) |

3. Communication (Primary: Trish & Molly)

Objective: *Ensure members, prospective members and the board has timely and accurate information.*

| Goals | Strategies |
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| C1. After each monthly program/meeting, gather attendee feedback, promptly within one week and post results on the board google site in the Communications section "Level 1 Evaluations" folder. | <ul style="list-style-type: none"> A. Convert existing survey form to be used for multiple meetings. B. Update the email template to point to the survey form. (Add career level to form) C. Place QR codes in the event room to allow attendees to complete before leaving laminated pages or cards?) D. Place a link to the response spreadsheet on the google site under communications and share via "gmail" accounts. |
| C2. Provide members, prospective members and board members with key information. | <ul style="list-style-type: none"> A. In December update the web site Board Member page with bios and pics of the next years board B. In January post the Annual Report for the previous year on the chapter web site. C. Publish a monthly newsletter |

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| | highlighting activities as well and the CHIP program and Power Membership. |
| C3. Maintain chapter website to provide updates on all current events, volunteer opportunities and ATD national promotions. | <ul style="list-style-type: none"> A. Publish chapter events on website, newsletters and social media platforms B. Publish open volunteer positions on website, newsletters and social media platforms. C. Add a form on the website for request to present for potential speakers (See sample from ATD Charlotte) D. Add monthly event image to website homepage. E. Update homepage news and announcements. |
| C4. Establish system to ensure communication elements of new sponsorship program and are clear consistently executed. | <ul style="list-style-type: none"> A. Create a form that sponsors and donors can use to purchase their tier or a la carte options and submit necessary communication elements (images, text). (Similar to ATD Houston using wufoo form) B. Create workshop and event blast templates that imbed sponsorship. C. Create tracker linked to Tiers and a La Carte options that flags necessary marketing activities based on a dropdown selection. |

4. Membership (Primary: Jim & Jim)

Objective: Maximize membership growth, retention and involvement.

| Goals | Strategies |
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| M1, Increase overall chapter membership by 5% (i.e. from 246 to 259) by December 31, | A. Enhance ambassador program |

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| 2020. | |
| Retain at least 50% (i.e. 123) Owner: Jim V | a. Define program goal, specific responsibilities and resources for volunteers. |
| Recruit at least 55% (i.e. 136) new members Owner: Jim R | b. Get at least 3 engaged volunteers to manage the operations of the program in collaboration with the VP's of Membership. . |
| | B. Enhance Corporate Membership Support <ul style="list-style-type: none"> a. Define program goal, specific responsibilities and resources for volunteers. b. Get at least 1 engaged volunteer with ATD National & Chapter experience that will specifically support corporate memberships; recruiting & retaining. C. Retention/Renewals <ul style="list-style-type: none"> a. Offer an incentive to renew by X date (eg. TICE Conference ticket) b. Offer \$15 discount for renewals during high renewal months (Jan, March & Oct) c. Create structured networking event(s) d. Run quarterly "engagement" report from Wild Apricot - ie # events attended per quarter and load into the "membership" area of the google site. If LT 50 % attendance ambassadors call to see why and solicit suggestions. e. Utilize ambassadors to |

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| | <p>call members 2-3 months before their renewal date to ask for feedback and remind them to renew.</p> <p>D. Recruiting/New Members:</p> <ul style="list-style-type: none"> a. Using the list from ATD national define specific events that target ATD national members become chapter members. b. Create a "Referral" program - Free passes etc. c. Revisit the current membership price and determine if should change. d. Create promotional text that members at co-location workspaces (HQ Raleigh, Frontier, WeWork etc) can use to post on their organizations communications network. |
| <p>M2. Maintain ATD Superstar Status (100% CARE compliance and 50% Power membership) by Dec 31, 2020</p> | <ul style="list-style-type: none"> A. <i>Power Membership</i>: Continue Promote the Benefits of Power Membership <ul style="list-style-type: none"> 1. At ALL chapter events including SIGS 2. In our newsletters 3. In social media B. <i>Power Membership</i>: Quarterly Request, Review and report (at board meetings) current joint membership numbers C. <i>Compliance</i>: Conduct an annual survey of members |

5. Professional Development (Primary: Alex & Hiram)

Objective: Provide programs and events which are VALUABLE to members.

| Goals | Strategies |
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| PD1. 80% of attendees at monthly program meetings state on their Level 1 Evaluation form (sample form) - “yes” the program was valuable to them. | <ul style="list-style-type: none"> A. Share link to level 1 evaluation at the end of each monthly chapter program and workshop. B. Level 1 evaluation form results are reviewed monthly and summary of findings as well as any suggested changes are shared at the monthly board meeting |
| PD2. Adjust programming text and/or program topics and programs dashboard to aligned to the New Competency Model by March 1, 2020 (i.e. prior to March Monthly Program) | <ul style="list-style-type: none"> A. Update the checkbox in the google event add form. B. Update any text for any current program that is on the web site C. Update the programs dashboard D. Review and revise if needed any programs that have not yet been scheduled. . |
| PD3. Enhance the variety of speakers. | <ul style="list-style-type: none"> A. Utilize the new Request to Present form on the web site B. Reach out to colleges for professors and current members C. Schedule and highly promote one high-profile speaker for a standard monthly program, at a location that can fit 200 ish people, to support membership and sponsorship goals |
| PD4. Offer some virtual professional development opportunities to our members. | <ul style="list-style-type: none"> A. Quarterly review the list of virtual workshop offerings from ATD National and then select the ones that our members may find valuable B. Add the workshops to our ATD-RTA events page via the google form AND noted CHiP code. See example from Dallas Chapter |