

# 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
<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 &amp; 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 <a href="#">Director of Volunteers</a> 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>

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

### 3. Communication (Primary: Trish & Molly)

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

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

	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"> <li>A. Publish chapter events on website, newsletters and social media platforms</li> <li>B. Publish open volunteer positions on website, newsletters and social media platforms.</li> <li>C. Add a form on the website for request to present for potential speakers (See sample from <a href="#">ATD Charlotte</a>)</li> <li>D. Add monthly event image to website homepage.</li> <li>E. Update homepage news and announcements.</li> </ul>
C4. Establish system to ensure communication elements of new sponsorship program and are clear consistently executed.	<ul style="list-style-type: none"> <li>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)</li> <li>B. Create workshop and event blast templates that imbed sponsorship.</li> <li>C. Create tracker linked to Tiers and a La Carte options that flags necessary marketing activities based on a dropdown selection.</li> </ul>

## 4. Membership (Primary: Jim & Jim)

**Objective:** Maximize membership growth, retention and involvement.

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

2020.	
<p>Retain at least 50% (i.e. 123)</p> <p>Owner: Jim V</p> <p>Recruit at least 55% (i.e. 136) new members</p> <p>Owner: Jim R</p>	<ul style="list-style-type: none"> <li>a. Define program goal, specific responsibilities and resources for volunteers.</li> <li>b. Get at least 3 engaged volunteers to manage the operations of the program in collaboration with the VP's of Membership. .</li> </ul> <p>B. Enhance Corporate Membership Support</p> <ul style="list-style-type: none"> <li>a. Define program goal, specific responsibilities and resources for volunteers.</li> <li>b. Get at least 1 engaged volunteer with ATD National &amp; Chapter experience that will specifically support corporate memberships; recruiting &amp; retaining.</li> </ul> <p>C. Retention/Renewals</p> <ul style="list-style-type: none"> <li>a. Offer an incentive to renew by X date (eg. TICE Conference ticket)</li> <li>b. Offer \$15 discount for renewals during high renewal months (Jan, March &amp; Oct)</li> <li>c. Create structured networking event(s)</li> <li>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.</li> <li>e. Utilize ambassadors to</li> </ul>

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

## 5. Professional Development (Primary: Alex & Hiram)

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

Goals	Strategies
PD1. 80% of attendees at monthly program meetings state on their Level 1 Evaluation form ( <a href="#">sample form</a> ) - “yes” the program was valuable to them.	<ul style="list-style-type: none"> <li>A. Share link to level 1 evaluation at the end of each monthly chapter program and workshop.</li> <li>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</li> </ul>
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"> <li>A. Update the checkbox in the google event add form.</li> <li>B. Update any text for any current program that is on the web site</li> <li>C. Update the programs dashboard</li> <li>D. Review and revise if needed any programs that have not yet been scheduled. .</li> </ul>
PD3. Enhance the variety of speakers.	<ul style="list-style-type: none"> <li>A. Utilize the new Request to Present form on the web site</li> <li>B. Reach out to colleges for professors and current members</li> <li>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</li> </ul>
PD4. Offer some virtual professional development opportunities to our members.	<ul style="list-style-type: none"> <li>A. Quarterly review the list of <a href="#">virtual workshop offerings from ATD National</a> and then select the ones that our members may find valuable</li> <li>B. Add the workshops to our ATD-RTA events page via the google form AND noted CHiP code. See example from <a href="#">Dallas Chapter</a></li> </ul>