

2022 Strategic Plan

ATD Research Triangle Area Chapter

Approved by vote of the ATD Board of Directors on January 18, 2022

Board of Directors

(Alex, Maria, Ken)

Goals		Strategies/Tasks		Due Date
1 Carried over from 2021	Develop, execute, and monitor a two-year strategic plan.	1a	<i>Create strategic goals for 2022 & 2023. (presidents)</i>	1/2022
		1b	<i>Monthly updates at board meetings. (presidents)</i>	monthly
		1c	<i>Formal mid-year check-in and revisions if necessary. (presidents)</i>	7/2022
2 1-Year Goal, Should relate to CARE +	Develop a formal onboarding program for new board members.	2a	<i>Research what other chapters are doing for board onboarding and get feedback on 2021 onboarding experience. (Maria)</i>	3/2022
		2b	<i>Design, Develop, and Document 2022 onboarding program. (presidents)</i>	8/2022
		2c	<i>Execute 2022 onboarding program. (Maria)</i>	9/2022
3 2-year goal (start in 2022, complete in 2023)	Review and enhance current succession plan.	3a	<i>Research other chapter's succession plans. (Maria)</i>	6/2022
		3b	<i>Review and determine missing components (recruitment, pre-board volunteer roles, etc.) (presidents)</i>	10/2022
		3c	<i>Update, obtain feedback, and approve new plan. (presidents)</i>	6/2023
4 Optional (Stretch goal or Related to Care +)	At least 2 Board Member(s) Presenters at ALC	4a	<i>Identify interested board members. (presidents)</i>	2/2022
		4b	<i>Apply to present at ALC. (presenters)</i>	3/2022
		4c	<i>Prepare presentation and present at ALC. (presenters)</i>	10/2022

Governance

(Alex, Maria, Ken, Wendy)

Goals		Strategies/Tasks		Due Date
1 Carried over from 2021	Build on recent SOS approvals by applying for national recognition.	1a	<i>Explore opportunities for recognition, including chapter of the month and chapter excellence awards; identify which we will apply for. (Alex)</i>	2/2022
		1b	<i>Complete any additional work necessary for recognition. (TBD)</i>	6/2022
		1c	<i>Apply for recognition if there is a good fit. (Wendy)</i>	9/2022
2 Related to CARE +	Review and update key documentation, including by-laws and risk plan.	2a	<i>Form small by-law review team to review and make suggestions. (Alex)</i>	8/2022
		2b	<i>Exec team review risk mitigation plan and make suggestions. (Presidents)</i>	8/2022
		2c	<i>Member approve suggested changes to by-laws; board approve suggested changes to risk plan. (Board)</i>	11/2022
3 2-year goal (start in 2022, complete in 2023)	Transition central repository and board communication to a more cohesive environment.	3a	<i>Explore options and identify which platform we will use. (Presidents)</i>	3/2022
		3b	<i>Prepare to transition platforms; create training materials. If Google Nonprofit, encourage folks to practice using Meet, Chat, Tasks, and Spaces in the current environment. (Ad Hoc Committee)</i>	10/2022
		3c	<i>Schedule the platform transition to take place at the least disruptive point in time. (Presidents)</i>	1/2023
4 Optional (Stretch goal or Related to CARE +)	Update Members Profile	4a	<i>Review current and adjust current profiles (Admin)</i>	3/31
		4b	<i>Revised questions and data to be captured in WA with input from membership - get BOD approvals (Ken/Admin)</i>	5/31
		4c	<i>Rollout - Post and ask Members to update their profiles (Admin/Membership)</i>	9/1

Communications

(Jazmin, Elissa)

Goals		Strategies/Tasks		Due Date
1 1-Year Goal, Should relate to CARE +	Member Communication: Chapter communicates with membership about non programming information including via blog, video blog (vlog), newsletter, and so on.	1a	<i>Once per quarter, have member participation/contribution to the newsletter and/or website</i>	<i>Quarterly</i>
		1b	<i>Promotion of 50th Anniversary across platforms (include mailers possibly)</i>	<i>Ongoing</i>
2 1-Year Goal, Should relate to CARE +	Communication Strategy: Chapter has a targeted communication strategy and plan (including social media) to communicate with prospects and members -	2a	<i>Update the communication strategy documentation to include email and social media strategy to promote two-way engagement where possible</i>	<i>Q1</i>
		2b	<i>Corporate social responsibility, international and local recognition; inclusion sessions (possible impact to programming)</i>	<i>Q1</i>
3 1-Year Goal, Should relate to Care +	Incorporation of Brand alignment workshop results to update Website and materials	3a	<i>Get member input (voting on brand concept) and then Board endorsement</i>	<i>Ongoing</i>
		3b	<i>Form a volunteer committee to executes task related to brand alignment (in conjunction with Director of Volunteers)</i>	<i>Feb 2022</i>
		3c	<i>Creation of ATD RTA Chapter Branding Guide</i>	<i>March 2022</i>
		3d	<i>Update the website and corresponding Communication Templates</i>	<i>October 2022</i>
4 2-year goal (start in 2022, complete in 2023)	Google Analytics monthly reporting to Board	4a	<i>Poll board to confirm what info might be interesting to receive</i>	<i>Feb-March 2022</i>
		4b	<i>Develop a short work instruction for understanding the Google Analytics report and pulling out relevant information</i>	<i>Q1 2023</i>

Membership

(Julie, Michelle)

Goals		Strategies/Tasks		Due Date
1 Carried over from 2021	Increase retention of new members (move to 55% existing/ 45% new, currently 50/50 split)	1a	Automate WA emails (series of 3 with eLearnings <i>Note: collaborate with comms</i>	3/1/2022
		1b	Create quarterly networking opportunity unique to new members (stand alone opty). Budget impact if in-person only.	3/1/2022
		1c	Update eLearning videos and create “learning pathway”	6/1/2022
		1d	Enhance accessibility and incorporate new branding on website <i>Note: Collaborate with Comms</i>	10/1/2022
2 1-Year Goal, Should relate to CARE +	Surpass Care+ Power Membership Goal by 5% to attain average power membership base of 50%.	2a	Proactively call Power Members up for renewal one month prior to renewal <i>NOTE: Collaborate with Volunteers</i>	3/1/2022
		2b	Create Power member eWelcome kit.	6/1/2022
		2c	Identify 3 ATD nat’l corporate member groups and convert to Power Members	10/1/2022
3 2-year goal (start in 2022, complete in 2023)	Increase base of auto renewals by 20% (currently 47; increase to 57)	3a	<i>Identify incentive for auto-renewals</i>	3/1/2022
		3b	<i>Contact members one month prior to renewal, to suggest auto-renewal</i> <i>NOTE: Collaborate with Volunteers & Comms</i>	5/1/2022
4 Optional (Stretch goal or Related to Care +)	Strengthen recruitment efforts to increase membership base by 10% (average membership base in 2021 = 209; 10% increase = 230 average members)	4a	Contact all “non-members” that attend monthly meeting.	3/1/2022
		4b	Explore badging system to showcase new member, 5 year, 10 year, etc.	6/1/2022
		4c	Grow student base by 25%	10/1/2022

Finance (incl. Sponsors)

(Kokeita, Paige)

Goals		Strategies/Tasks		Due Date
1 1-year goal	Increase Income from Sponsorship Program to \$3,750 for 2022 (from new and renewing sponsors) and increase engagement with sponsors.	1a	<i>Engage with other associations (ie. AENC - attend 3 - 4 events during the year) to increase awareness ATD and recruit sponsors</i>	12/31/2022
		1b	<i>Reach out to sponsors quarterly to ensure they are satisfied, monitor their needs and track sponsorship benefits monthly</i>	12/31/2022
		1c	<i>Connect with other ATD Chapters to gather best practices for recruitment and retention of sponsors and update Sponsorship brochure with new sponsorship types</i>	2/28/2022 and ongoing
		1d	<i>Work with Communications to create a pitch deck for attracting sponsorship opportunities.</i>	6/30/2022
2 Optional (Stretch goal or Related to Care +)	Increase Income from Sponsorship Program to \$5,000 for 2023 (from new and renewing sponsors) and continue to increase engagement with sponsors.	2a	<i>Offer brief Chapter Sponsorship infomercials at beginning of monthly programs when there is no Chapter Sponsor for the program</i>	12/31/2023
		2b	<i>Continue membership in other associations to continue sponsorship outreach to support chapter programming and operations</i>	12/31/2023

Programming (incl. SIGs)

(Sean, Nadine)

Goals		Strategies/Tasks		Due Date
1 1-Year Goal, Should relate to CARE +	Plan a year of monthly programs for the chapter.	1a	<i>Share a list of meeting dates and topics to the board Google site to assist with marketing, sponsors, and SIG planning. (Nadine & Sean)</i>	2/1/2022
		1b	<i>Submit complete monthly program information to marketing team at least 45 days in advance of each event. (Nadine & Sean)</i>	ongoing
		1c	<i>Continue to provide a variety of meeting options, including lunch & learns and socials. (Nadine & Sean)</i>	ongoing
2 1-Year Goal, Should relate to CARE +	<i>Provide in-person options for member events.</i>	2a	<i>Bring back munch and mingles or a similar type of event; Identify who will participate in a group of rotating hosts (Alex) and schedule sessions for the first half of the year.</i>	3/15/2022
		2b	<i>Evaluate first several sessions and schedule second half of the year based on successes & lessons learned. (TBD)</i>	6/15/2022
		2c	<i>Develop a plan for hybrid meetings, including logistics, risk mitigation, and how to pivot to/from virtual if needed. (Sean & Presidents)</i>	6/1/2022
3 2-year goal (start in 2022, complete in 2023)	<i>Develop methods for bringing in high quality presentations.</i>	3a	<i>Create a speaker agreement that includes code of ethics, fee terms, quality check, etc. (Nadine & Sean)</i>	4/1/2022
		3b	<i>Liaise with other chapters and personal networks to develop a roster of high-quality speakers regardless of topic for future sessions. (Nadine & Sean)</i>	10/1/2022
		3c	<i>Use speaker agreement, roster of high-quality speakers, and identified needs from member surveys to develop 2023 program calendar. (Nadine & Sean)</i>	1/15/2023
4 Optional (Stretch goal or Related to Care +)	Working with other ATD Chapters, take the lead on representing the Chapter with rolling out a Regional Day of Learning Conference in Fall, 2022	4a	<i>Submit proposal to our Board for Approval (Ken)</i>	1/18
		4b	<i>With other chapters, design the program (DoL Committee)</i>	9/30
		4c	<i>Conduct Conference (DoL Committee)</i>	TBD
5 Optional (Stretch goal or Related to Care +)	Provide board level support to Special Interest Groups	5a	<i>Schedule quarterly All-SIG leader collaboration calls to foster sharing of ideas, event planning, and problem solving for common issues.</i>	ongoing
		5b	<i>Thanks SIG leaders in various ways and at multiple touchpoints throughout the year.</i>	ongoing

Volunteers

(Karen)

Goals		Strategies/Tasks		Due Date
1 2-year volunteer goal (start in 2022, complete in 2023)	Maintain Volunteer Appreciation and Recognition	1a	<i>Update Volunteer Awards and Recognition page on the website.</i>	<i>February 2022</i>
		1b	<i>Determine expectations of board members and SIG leaders. What's working, what's not</i>	
		1c	<i>Hold Volunteer Fair at Annual Open House to generate interest and communicate the impact of volunteers on the overall success of the chapter.</i>	
2	Establish and maintain volunteer pool of 12 members	2a	<i>Contact individuals on Volunteer Page to learn about areas of interest, time available, and expertise</i>	<i>February 2022</i>
		2b	<i>Follow-up with volunteers to thank and to gain feedback on volunteer experience. Obtain feedback from "task leader"</i>	
		2c	<i>Once a quarter, highlight volunteer needs in newsletter</i>	
3	Establish process to identify needs and match volunteers	3a	<i>Create volunteer "intake" form to capture details about time commitment and skills needed</i>	<i>March 2022</i>
		3b	<i>Create task checklists that communicate expectations</i>	
		3c	<i>Establish process to record volunteer contributions</i>	

Student/Community Outreach

(Marianne)

Goals		Strategies/Tasks		Due Date
1 1-Year Student/ Community Outreach Goal	Conduct a needs assessment to determine interests and needs of current and past student members	1a	<i>Create a survey and distribute to current and past student members</i>	March 2022
		1b	<i>Conduct follow up with either 1-1 conversation or focus group</i>	
		1c	<i>Hold student specific event based on feedback from needs assessment</i>	
2 1-Year Student/ Community Outreach Goal	Define 'community'	2a	<i>Clarify a definition of community as it relates to ATD's goals and organizational objectives</i>	October 2022
		2b	<i>Identify 2-3 opportunities for chapter involvement -Dress for Success, Mentoring, etc.</i>	
		2c		
3 1-Year Student/ Community Outreach Goal	Determine ways to capitalize on the Day of Learning	3a	<i>Create volunteer opportunities for students</i>	October 2022
		3b	<i>Explore offering a discounted rate for students</i>	
		3c	<i>Create opportunities for student to co-present</i>	
4 2-year goal (start in 2022, complete in 2023)	Explore Opportunities for internships and practicum experiences	4a	<i>From needs assessment identify interest in creating program</i>	June 2022
		4b	<i>Identify potential opportunities from current corporate members</i>	
		4c	<i>Create a matching or connection program</i>	