

# ATD-Cascadia 2023 OPERATING PLAN



# ATD-Cascadia

## 2023 OPERATING PLAN

*ATD chapters are required to submit their 2023 operating plans as part of the Chapter Affiliation Requirements (CARE). Operating plans should provide a framework for effectively doing business and efficiently managing resources. An operating plan explains how the chapter will achieve the outlined goals and objectives, so that chapter activities are consistent and target member needs. The plan also specifies how board members will share information with one another and their stakeholders. When setting goals for the chapter, board members should utilize the SMART (specific, measurable, action-oriented, realistic, and timely) framework to develop a timeline and action plan for accomplishing each objective. **To be 100 percent CARE achieved, operating plans must include information about annual goals, a communication and marketing strategy, a recruitment and retention strategy, and a succession planning strategy.** This template also includes optional sections that your chapter may consider including about programming and engagement strategies. Neither of these sections need be included in the operating plan for the chapter to be 100 percent CARE achieved. Board members should work together to develop a plan and review and update the plan as needed throughout the year.*

*Please customize the branding and content as needed for your chapter and reach out to your [chapter relations manager](#) (CRM) if you have additional questions or would like to receive a copy of the operating plan that your chapter submitted in 2022.*

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## Mission and Vision

### *Mission*

Our mission is to empower professionals to develop talent in the workplace.

### *Vision*

Our vision is to create a community that works better.

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## Board Member Initiatives

### President

Conduct two board retreats for strategic planning purposes

Continue to use and develop Monday.com as the central platform for chapter operations

### VP of Membership

New member onboarding sessions

Welcome kits for new members

Annual member satisfaction survey

Volunteer recognition event

### Director of Finance

Stewardship of CARE throughout the year

Expand understanding and use of Monday.com to increase agile chapter operations

### VP of Professional Development

Schedule programs and learning activities to support and promote certification

Align FOT offerings with the ATD Capability Model

Increase support for CPTD and APTD Certifications

Design and deliver one new recurring FOT program

### VP of Monthly Programs

Increase attendance of monthly chapter meetings

Align presentations to the ATD Capability Model

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## Annual Goals

- 1. Establish a system for long-range, multi-year planning*
  - Conduct two board retreats for strategic planning purposes [President]
  - Continue to use and develop Monday.com as the central platform for chapter operations [Director of Finance]
  - Fill vacant board positions [Board]
  - Board Member Succession Planning [President]
- 2. Increase Member Outreach and Engagement*
  - Promote and support APTD and CPTD certifications [Director of Professional Development]
  - Continue outreach to increase renewal rate [Director of Membership]
  - Deliver welcome kits and new member orientations [Director of Membership]
- 3. Engage Members with Relevant Learning Opportunities*
  - Curate Quality Learning, Networking, and Professional Development Events
  - Align all programming with the ATD Competency Model
- 4. Review and enhance professional development offerings*
  - Align all FOT programming with the ATD Capability Model and promote the value [Director of Professional Development]
  - Deliver Fundamentals of Training and create one new recurring professional development program [Director of Professional Development]

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## Communications and Marketing Strategy

### **Goal: Ownership of Marketing Messages**

All board members who curate events will continue to be responsible for creating the marketing messages for their assigned events. Board members may choose to delegate the development of marketing messages to a chapter volunteer.

The board will continue to increase its use of the LinkedIn platform to promote all programs and events. The chapter will continue leveraging the Canva platform to create promotional pieces for use on social media until a Director of Communications is appointed to the board.

### **Goal: Deliver Targeted President Messages Every Month**

Each monthly Cascadia Calendar message will contain a message written by the chapter president with messages addressing trends in talent development, upcoming chapter events, and reflections on the National ICE conference.

## Recruitment and Retention Strategy

### **Goal: New Member Orientations**

The Director of Membership will hold new member orientations to enhance member participation and to clearly articulate the value and benefits of membership to promote retention.

### **Goal: New Member Welcome Kits**

Each new member will receive a welcome kit that thanks them for their membership, offers easy engagement calls to action, and articulates the value and benefit of membership to promote retention.

### **Goal: Continue Outreach to Increase Renewals**

Renewal messages will continue to be sent out two weeks after a membership has expired in addition to the alerts that are already going out 180, 90, 30, 7 days before expiration and 30 days after expiration. The renewal messages will be updated during 2023. The Director of Membership will also run reports on members who are at risk of not renewing to allow for individualized follow up by either the Director of Membership, staff administrators, or another member of the board.

### **Goal: Promote and Support APTD and CPTD Certifications and Re-certifications**

The chapter will complete three workstreams to support APTD/CPTD certifications:

- Partner with another chapter on study group participation
- Engage current certified members on presentation opportunities
- Deliver one APTD/CPTD informational meeting

## Succession Planning Strategy

### **Goal: Board Succession Planning**

Working collaboratively, the board will actively seek to invite interested parties to attend board meetings, in addition to posting information about attending on the website. Each board member is responsible for identifying volunteers that can serve as potential successors.

- Engage members of the chapter by utilizing their strengths for volunteer positions which grow the leadership pipeline
- Build a leadership pipeline/talent pool to ensure leadership continuity
- Develop potential successors in ways that best fit strengths
- Identify the best candidates for positions
- Clearly define competency requirements along with strategies to develop both existing and new volunteer leaders to meet these needs
- Identify and transfer key knowledge and information that might otherwise be lost
- Ensure that the chapter's current mission and vision are carried forward by future leaders

### **Goal: Fill Open Board Positions**

The board will fill the following vacant positions:

- President-Elect
- Director of Marketing
- Director of Volunteers
- Director of Learning Events



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## *OPTIONAL*

### Programming Strategy

#### **Goal: Curate Quality Learning, Networking, and Professional Development Events**

Working collaboratively, the board will create assignments to curate the following slate of events for 2023:

- 9 monthly chapter meetings
- 1 Annual chapter meeting (to include volunteer recognition)
- 4 Fundamentals of Training
- 1 New FOT program
- Monthly free member networking events, such as Coffee Hour, Learning Leaders SIG, or Learning Over Lunch
- Minimum of 6 half-day learning events

Align all programming with the ATD Capability Model.