



ATD chapters are required to submit their 2024 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 2023.

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.

Board Member Initiatives

President

Conduct two board retreats for strategic planning purposes

Provide governance on succession planning for upcoming vacant positions

Deliver guidance on conference planning activities to board of directors

VP of Membership

New member onboarding sessions and welcome kits for new members

Tracking reports and conducting outreach for member retention

Annual member satisfaction survey

Volunteer recognition event

Director of Finance

Stewardship of CARE throughout the year

Budget forecasting and oversight

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

Oversight to deliver three FOT offerings

Increase support for CPTD and APTD Certifications

VP of Monthly Programs

Increase attendance of monthly chapter meetings

Align presentations to the ATD Capability Model

Contribute to quarterly programming efforts to spotlight featured competencies

Director of Events

Develop and curate 9 half-day workshops focused on T&D competencies and capability presentations from T&D vendors

Contribute to quarterly programming efforts to spotlight featured competencies

Director of Research

Annual member satisfaction survey

Develop conference survey strategy

Prepare membership analytics: retention rate

Prepare social media, website, and email analytics

Benchmark event and membership data against other chapters

Director of Marketing & Communications

Develop monthly chapter messages

Deliver and administer message campaign on the chapter's LinkedIn platform

Support board members in promoting their assigned events

Increase support for CPTD and APTD Certifications

Leverage the chapter's contact list for targeted communications

Annual Goals

1. Establish a system for long-range, multi-year planning

- Conduct two board retreats for strategic planning purposes [President]
- 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 [Director of Professional Development]
- Present a one-day conference with learning tracks that include instruction technology, leadership, talent development, and other T&D competencies

Communications and Marketing Strategy

Goal: Promote Chapter Events and Value of Membership

The Director of Marketing and Communications will

- Support board members in promoting their assigned events.
- Deliver and administer message campaign on the chapter's LinkedIn platform
- Increase support for CPTD and APTD Certifications
- Leverage the chapter's contact list for targeted communications

Goal: Deliver Targeted Chapter Messages Every Month

Each monthly Cascadia Calendar message will address trends in talent development, upcoming chapter events, seasonal business rhythms, 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 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 two workstreams to support APTD/CPTD certifications:

- 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
- 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

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 2024:

- 9 monthly chapter meetings
- 1 Annual chapter meeting (to include volunteer recognition)
- 3 offerings Fundamentals of Training
- A 1-day conference in Portland Oregon with concurrent learning sessions
- 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.