

**ATD-Cascadia**

**2020 OPERATING PLAN**

*ATD chapters are required to submit their 2020 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*](about:blank) *(CRM) if you have additional questions or would like to receive a copy of the operating plan that your chapter submitted in 2018.*

**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

Succession planning

Increase engagement and visibility of chapter within the community

President-Elect

Past President

Conference

Member metrics and engagement

VP of Volunteers

Volunteer survey and outreach

Succession planning

VP of Membership

Monthly chapter meetings

Virtual-remote sessions

Member metrics and engagement

Secretary / Treasurer

Stewardship of CARE throughout the year

Introduce cloud-based platform to establish agile chapter operations

**Annual Goals**

1. *Jumpstart Q1, Q2 revenue*

* Objective: Curate learning events and professional development events so registration can begin in January 2020.
* Curate two Fundamentals of Training workshops (one for Q1, one for Q2) [Diane]
* Curate five half-day workshops, one per month through May [D.J.]
* Events posted to website and registration open by 01/15/2020. (Q2 Fundamentals of Training will be posted by the end of Q1).

1. *Jumpstart Q3, Q4 revenue*

* Objective: Initiate early conference planning so that conference registration can open by June 1, 2020.
* Identify conference chairperson and committee [Diane]
* Establish conference committee meeting cadence [Diane]
* January 2020

1. *Double amount in our reserves (chapter savings account)*

* Objective: Increase the value of the chapter savings account from $10,000 to $20,000
* Curate targeted revenue-generating events: Accidental Trainer [Diane], and Captivate Essentials/Captivate Advanced [D.J.]
* Accidental Trainer launches March 2020, Captivate launches June 2020

1. *Strategic board recruitment and onboarding for 2020 & 2021*

* Objectives: Identify a President-Elect for 2021 and fill open positions (Director of Events, Director of Programs, Director of Communications).
* Tasks and Owners: President-Elect to be identified by start of Q2; Other board candidates to be determined by the end of Q2. Elections to be held during the summer, to allow new board members to begin shadowing/onboarding prior to November 1st appointment. [Erin]
* Timeline: See second bullet point.

1. *Build infrastructure of volunteers for committees and task forces*

* Create a leadership pipeline for the board; create clear roles and responsibilities for volunteer tasks; recruit volunteers based on their interests and needs.
* Create a directed email to recruit volunteers based on interests and time available [Kerri]; Identify a short list of approximately 5-10 people who could be regular, stable, back up volunteers [Kerri]; Use social media to recruit new volunteers [Erin]; Develop roles and responsibilities for new volunteer positions [All board].
* Timeline: Direct email campaign January 2020; Social media campaign quarterly; Roles and responsibilities documents ongoing.

**Communications and Marketing Strategy**

## Goal: Board Visibility to Regular Chapter Communications

Continue current cadence on regular communications as managed through Constant Contact platform. The business manager will consult with the board to refine and update messages and content.

## Goal: Ownership of Marketing Messages

All board members who curate events are 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 also increase its usage of social media platforms to promote all programs and events. The board President will create promotional pieces for use on social media until a Director of Communications is appointed to the board. All board members will be expected to promote said promotional pieces with their individual social media accounts, as they are able.

The board will perform direct outreach to individuals in the community by personally inviting several members or active nonmembers to ongoing events and programs.

**Recruitment and Retention Strategy**

## Goal: Monthly Review of Membership Metrics

The Past-President will share member metrics during board meetings and engage the board in analysis of trends, opportunities, and outreach efforts.

## Goal: Target Program Attendees for Membership

With the support of the Director of Membership, the President and/or Past-President will drop in to quarterly sessions of Fundamentals of Training and the Accidental Trainer to educate attendees about ATD, events and programs, and the benefits of membership.

## Goal: Increase Outreach to Increase Renewals

Additional renewal messages will 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 a member of the board.

**Succession Planning Strategy**

## Goal: Board Succession Planning

Working collaboratively, the President and the Director of Volunteers will document board stories, testimonials, and targeted opportunities to invite members to visit board meetings.

## Goal: Creation of an Updated Organization Chart

The Director of Volunteers and the President will work together to create an organization chart that incorporates all volunteer positions and who they report to on the board.

***OPTIONAL***

**Engagement Strategy**

**Solidify and Improve benefits for remote members**

President, Past-President and the Director of Membership will work with chapter members in Eugene to relaunch our Geographic Interest Group (‘GIG’) there. A regular, ongoing meeting space will be identified, which will host GIG meetings at least quarterly to start. The President will attend the first meeting, at least, and work with the Eugene volunteers to create a virtual option for attendees in Portland and other areas to participate remotely. The board will work as a whole to ensure that there are sufficient virtual programs for members outside the Portland-metro area to attend.

***OPTIONAL***

**Programming Strategy**

## Goal: Curate a program of learning, networking, and professional development events

Working collaboratively, the board will create assignments to curate the following slate of events for 2020:

- 11 monthly chapter meetings

- 4 Fundamentals of Training

- 2 Accidental Trainers

- 6-8 half-day sessions

- 6 virtual/remote sessions

- Conference

- Volunteer recognition

The board will also work with a group of dedicated volunteers to create a new event, ATD DemoFest, a science fair-like event to showcase eLearning examples submitted by members.