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| **Chapter Name** | ATD Hawaii |
| **Chapter Number (ex. CH0000)** | CH8008 |
| **Chapter Location (City, State)** | Honolulu, HI |
| **Chapter Membership Size** | Medium (101 - 349) |
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| **Chapter Board Position:** | President |
| **Chapter Website URL:** | [http://atdhawaii.org](http://enotification.td.org/track/click/30530608/atdhawaii.org?p=eyJzIjoieWU1XzI4VUFRdmxiRjNDNHhSNFZVNnFsTkVBIiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwOlxcXC9cXFwvYXRkaGF3YWlpLm9yZ1wiLFwiaWRcIjpcImM4YWQyM2Y5NjRlOTRiN2ZhMTc5YWYzNzRhZWFiZTMwXCIsXCJ1cmxfaWRzXCI6W1wiNGFhODkxZDRlMGRhYjJjODYzY2RkOGYxNzdhMmEwM2QwOWVmZjMxYlwiXX0ifQ) |
| **Submission Title:** | Formula for Transforming Your Chapter = Strategic Planning + ALC Learning + Continuous Improvement Practices |
| **Submission Description:** | Many chapters suffer from the same struggles we experienced (last minute event planning, members lapsing, high no-show rate, board burn-out, lack of succession planning). What we needed was a methodical way to agree on the current reality of our chapter, reevaluate member expectations, and identify our strategic focus and initiatives for the next two years. ATD Hawaii experienced a game-changing journey after participating in ALC 2017, then presenting this very topic at ALC 2018. Combining a practical strategic planning framework, the invaluable learning from ALC, and the relentless spirit of continuous improvement, this chapter experienced an increased board engagement, better member experience, improved program attendance, increased membership growth, and national recognition.  Through this process, we were able to: • Apply the practical framework provided to conduct a strategic planning session for our chapter.  • Adopt a "continuous improvement" mindset to execute our initiatives efficiently and effectively to help transform our chapter. • Use a model to classify customer expectations to identify ways to be more member-centric and delight our members. |
| **Need(s) Addressed? Please be specific.** | We were struggling with the following: - Stressful last minute event planning - High no-shows at events - Members lapsing - Lack of "measures of success" - Board burn-out - Lack of succession planning/uncertain future  These were "effects" of a bigger problem... the fact that we had no strategy year after year. The need, therefore, was to have a methodical way to plan our year strategically, and work to execute efficiently. |
| **What is your chapter's mission?** | Fostering a collaborative community, sharing knowledge and resources to achieve greater effectiveness. |
| **How does this effort align with your chapter's mission (Please provide specific examples)?** | Our chapter members rely on our volunteer board to create a collaborative forum where our members can freely share knowledge and resources so we can all be better than working alone. Having a strategic focus and initiatives ahead of time allows us to provide relevant programming and activities needed to foster such environment. For example, by diversifying our program type/speakers/topics (i.e. day/evening, workshop/field trip, etc.), we were able to attract different attendees. It helped people create new connections for our membership, and we saw first hand how those relationships blossomed throughout the year to make all of us better professionals. |
| **National ATD's mission is to "empower professionals to develop talent in the workplace". How does this submission align with ATD's mission? Please provide specific examples.** | We can have the best of intentions, but without having a strategic mindset and the discipline to execute your initiatives consistently throughout the year, it's difficult to achieve the national ATD's mission "well". Learning about the strategic planning process itself was a developmental opportunity for all of us. And the fact that Makana Risser Chai and I (Ai Tanaka) got to present this at ALC also afforded us the opportunity to improve our facilitation/public speaking skills. We are grateful! |
| **Target Audience: (Who will benefit/has benefited from this effort?)** | - The board benefited tremendously so we can be on the same page - Some of us on the board have used this same process in our workplace to help our organizations/departments - Members also benefited tremendously because they were the recipients of our hard work - This is such a versatile/practical framework/methodology that anyone can benefit |
| **Costs/Resources Used: (include any details regarding use of resources including monetary, donations, contributions, volunteer hours, people resources, etc. and how you went about getting these resources)** | One of our board members who has an extensive experience working with local CEOs was generous enough to share this strategic planning process with me. As the new President, it benefitted me tremendously to have a practical framework like this that we can all understand and start using immediately. No cost except the willingness to learn and execute. |
| **How did you implement: (please give a brief description)** | I planned a strategic planning session in October 2017. 3 weeks prior, I asked everyone to complete a SWOT analysis individually. We had a volunteer summarize everyone's input before the strategic planning session. I used PowerPoint to explain the process. We covered core ideology (review of missions, visions, our core values), discussed the SWOT summary to gain agreement on the current reality of our chapter. Then, we tied that to the "key focus areas" for the next 2 years. From there, we derived the 2018 initiatives and quarterly objectives/metrics. We asked everyone where they'd like to contribute. Took half a day. |
| **What were the Outcomes: (Please include hard data regarding financial gains, membership increases, target audience satisfaction levels, publicity for the chapter or for the profession, etc.)** | - 58% increase in membership - We became a medium chapter in June 2018 (active members 110 as of today) - 18% reduction in no-show at events - Average of 85% show rate at events - Average of 30 attendees at events - Financial stability: our bank balance is about 20K. When I started on the board 3 years ago, it was under 10K. - More companies willing to host ATD events for free due to our reputation: Bank of Hawaii, Blue Cross Blue Shield of Hawaii, Central Pacific Bank, other local businesses. |
| **Lessons Learned: (hints and tips for other chapters who may be considering a similar effort)** | - The power of being strategic and focused - it helps us to execute intentionally - The importance of gaining alignment early on with your board - causes less stress  - The continuous improvement mindset becomes our habit once we started practicing regularly; it's the way we do any work now which leads to improvement/benefit for our members - Having a clear vision of where we want to be in 2 years gives us that compass and excitement - What gets measured gets done - Getting on the same page about the current reality of your chapter is the first necessary step in coming up with your plan for the year |
| **Please list the specific ATD chapter resources that helped guide you in the process of completing this best practice (e.g. people, documents, policies, by-laws, etc.):** | All board members, strategic planning framework (called "Execution Roadmap"), SWOT analysis template, PowerPoint deck on the process. |
| **How did you become familiar with the Sharing Our Success (SOS) program?** | Found SOS on ATD website |
| **If you selected "other", please explain your response.** | Multiple touch points |
| **Would you be willing to present on this submission at the ATD Chapter Leaders Conference (ALC)? \*Request for Proposals (RFPs) open in May of each year at** [**td.org/alc**](http://enotification.td.org/track/click/30530608/td.org?p=eyJzIjoiZS1FUnQtVjlnSFExS281enh3MVo1eWpZTTA4IiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwOlxcXC9cXFwvdGQub3JnXFxcL2FsY1wiLFwiaWRcIjpcImM4YWQyM2Y5NjRlOTRiN2ZhMTc5YWYzNzRhZWFiZTMwXCIsXCJ1cmxfaWRzXCI6W1wiNTYzOWQ5MmYyNjI4ZmQ3YjQ3YmRjNDRhNzYxY2IwMDliZWVkYzA3ZVwiXX0ifQ)**. Selected session facilitators receive complimentary registration.** | Yes |