

Sharing Our Success (SOS) Submission Form

Chapter Name: Research Triangle Area

Chapter Membership Size: Medium (101-299)

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Submission Title: SMART Strategic planning with CARE

What did you do? (a 2-3 sentence summary of your effort): We built a two-year operating plan based on the CARE+ elements. We built a strategic planning template, inclusive of CARE+, allowing each functional area of the board to contribute to their respective areas of the overall plan. We also tied in our budget process so every goal in the plan is specifically linked with income or expense.

Who benefitted from this effort (Target Audience) Check all that apply:

- Chapter Members
- Board Members
- Chapter Volunteers
- Chapter Sponsors
- Chapter Partners
- Potential Chapter Members

Why did you do it? What chapter needs were addressed? In order to increase our transparency, bring focus on the products we provide our members, and drive intention with our efforts to engage members, we created this framework to guide us in our strategic planning. The operating plan document inclusive of CARE+ elements easily allowed our board members to link their contributions to the overall plan. This framework allowed us to put more structure and purpose to the quality of what we are offering our members. We needed to demonstrate equal or increased value of our virtual events as compared to our past, in-person events. Creating a two-year plan helps us to demonstrate long-lasting, high quality.

What were the measurable outcomes? (May include data regarding financial gains, membership increases, target audience satisfaction levels, publicity for the chapter or for the profession, etc.)

The budget and strategic plan were completed in a timely manner, with buy in from our entire board. We decreased the approval time by 50%. Because of our approach kicking off in January, we have a clearer way to measure and track progress for our objectives throughout the year. We have a path forward that is easy to monitor from month to month. More holistic goals have been developed as a result of our approach, across the spectrum of functional areas of the chapter.

What steps did you take to implement this effort? (Remember that other chapter leaders will use this to replicate the effort. Be specific)

Step 1) Background - new board member elections in September, and onboarding of new board members in October so that the new board members can attend ALC. Set up rolling board members as we learned from ALC 2018, which means that about 50% of the board members are in the middle of their term, while about 50% of the board is joining fresh, so we have a mix of tenured and new board members.

2) We hold a board retreat in January, with this year's retreat begin a 4 hour virtual session. By the time new board members attend the retreat, they have attended ALC, they have some background to the role and expectations, and exposure to CARE.

3) The President Elect created a template which combined operating plan with CARE + elements and was provided to all board members as part of pre-work prior to the retreat. The pre-work required that each board member brainstorming with their board partner on their functional area. For example, Communications and Marketing + Social Media are two separate roles on our board, but the two board members collaborated on their goals and alignment with CARE + which completing their section of the operating plan template.

4) President Elect created a CARE + tracker to document elements achieved over the course of the year to drive accountability throughout the year. This tracker will be maintained by the President Elect, with inputs received from other board members throughout the year.

5) At every board meeting, the progress on the operating plan is reviewed and each board member is encouraged to document progress/status of activities as part of pre-work for the board meeting to reduce discussion time.

6) In July, we will have a second mandatory board retreat, as a checkpoint to review operating plan and CARE achievements for the year so far.

7) During monthly small function check-ins, the President Elect will join the board members representing the specific areas and review the tracker for progress updates.

8) End of Year - The tracker results can be used in conjunction with data from Wild Apricot to complete the CARE application in an efficient way.

Is there anything you would do differently?	<p>A few things we would do differently are the following:</p> <ol style="list-style-type: none"> 1) Bring our Special Interest Group (SIG) leaders into this conversation in the future to garner and encourage their support with achieving chapter goals. 2) Give board members more examples of goals/elements, by suggesting "SOS reading" as homework for inspiration 3) Address any knowledge gaps on CARE and strategic planning for new board members prior to joining the board retreat 4) Provide background knowledge on the historical/trends of the chapter to contribute to decision-making related to the operating plan 5) As this was our first virtual workshop, and even with the pre-work, we needed more time. Recommend having two workshops instead of one, providing more time for homework in between. 6) Provide more clear expectations regarding the time commitment for new board member onboarding, goal setting, and strategic planning
When did you start working on this effort?	Oct 01, 2020
When did this effort go live?	Jan 19, 2021
Approximately how many hours were spent working on this? Include an estimate of hours spent across all board members and volunteers.	250
What resources did you use? Check all that apply:	Board Members ATD Resources
Which board positions were involved in the effort?	All
Select the ATD resources you used. Select all that apply:	Other: Past ALCs: Another chapter's SOS on rolling board members, and 2-year strategic planning SOS from DC Chapter
Do you have any additional insights to share with other chapters implementing this effort?	<p>Start early and it's a team effort. Do not try to do this all at once. We started with the board member terms and we transitioned to the Operating plan piece. Give time for the board member transition to take effect before decisions are made. Create a transition plan with clear expectations for involvement of new board members. Strive to increase efficiency when in planning sessions so you can maximize the time you have together. This was the ultimate purpose of the templates, and we have achieved that.</p>
Please attach any documents that help support this submission. It is highly encouraged to submit editable files (ex. Word, Excel, etc): (additional documents and documents over 2MB should be sent to sos@td.org)	https://www.formstack.com/admin/download/file/10293725431

additional supporting documents:

<https://www.formstack.com/admin/download/file/10293725432>

How did you become familiar with the Sharing Our Success (SOS) program? Select all that apply:

Chapter Leader
ATD Chapter Leaders Conference (ALC)
National Advisors for Chapters (NAC)
NAC Area Call
Leader Connection Newsletter (LCN)

Would you be willing to apply 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. Selected session facilitators receive complimentary registration.
