2021-22 ATD Research Triangle Area Strategic Planning Worksheet

The ATD-RTA strategic plan aligns with the 6 components of the ATD [Chapter Affiliation Requirements (CARE)](https://www.td.org/chapters/clc/care).

|  |  |  |
| --- | --- | --- |
| Board Of Directors with solid fill Board of Directors (Pres/P.Pres/P.Elect) [p.3](#_heading=h.gjdgxs)-4 | Coins with solid fill Finance (Finance/Admin) [p.7-8](#_heading=h.3znysh7) | Teacher with solid fill Programming (Prog./Logistics) [p.11-12](#_heading=h.tyjcwt) |
| Gavel with solid fill Governance (Pres/P.Pres/P.Elect) [p.5-6](#_heading=h.1fob9te) | Social network with solid fill Membership (Recruit/Retention) [p.9-10](#_heading=h.2et92p0) | Megaphone1 with solid fill Communication (Comm./Mktg.) [p.13-14](#_heading=h.3dy6vkm) |
|  | (Floaters: Outreach, Volunteers, Sponsors) |  |

**Instructions:**

1. Locate the section for your area of responsibility.
2. Enter your four (4) 2021-22 goals
   1. At least two goals must meet CARE + requirements
   2. Have one optional “stretch” goal
   3. Last goal can be started but may not be completed until 2022.
3. For each goal, define the strategies or tasks that will help to achieve the goal.
4. Estimate the income or expense (if any) to complete each strategy or task.
   1. Please list the budget line for the income or expense.
5. Enter aDue Datefor when you expect to complete each goal.
6. Be prepared to explain your strategy for achieving each goal and budget estimate to the entire board.

**Optional bonus work:**

1. Repeat 1-6 in any component(s) of your choice outside of your direct responsibility.
   1. Be prepared to share with the board.

**Sample**

Here’s a sample goal, strategies, costs, and budget line.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Board of Directors** Primary: President, President-Elect, Past President, Director At-Large  *Objective: Ensure operational success* | | | | | **CARE Foundations:**   1. Board Meetings: Chapter board meets at least once per quarter. 2. Board Roster: Chapter submits an incoming board roster in Excel template. 3. Professional Development: Chapter board members maintain Power Membership (joint chapter/ATD national membership). 4. Position Descriptions: Chapter maintains written position descriptions for elected members. | | | |
| **Goals** | | | **Strategies/Tasks** | | | **Budget Line** | **Estimated Cost** | **Due Date** |
| A1 | Related to CARE+ | Recruitment Strategy: Chapter has a volunteer recruitment strategy in place for positions that support board work. | A1.1 | Add Director of Volunteerism to Board | | Admin/7010 | $600 to cover ALC Attendance | 1/31 |
| A1.2 | Created a Volunteer Webpage on Website and in Monthly Newsletters. | | N/A | $0 | Website completed by 2/21 – Monthly Newsletter, on-going |
| A1.3 | Include on revolving PowerPoint at start of Monthly Meetings and (verbal) requests go out for volunteers during same meetings | | N/A | $0 | Monthly |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Board of Directors** Primary: [President](mailto:president.atdrta@gmail.com) (Ken), [President-Elect](mailto:president.elect.atdrta@gmail.com) (Alex), [Past President](mailto:past.president.atdrta@gmail.com) (Carol), [Director At Large](mailto:director.at.large.atdrta@gmail.com) (Lynn)  *Objective:* | | | | | **CARE Foundations:**   1. Board Meetings: Chapter board meets at least once per quarter. 2. Board Roster: Chapter submits an incoming board roster in Excel template. 3. Professional Development: Chapter board members maintain Power Membership (joint chapter/ATD national membership). 4. Position Descriptions: Chapter maintains written position descriptions for elected members. | | | |
| **Goals** | | | **Strategies/Tasks** | | | **Budget Line** | **Estimated Cost** | **Due Date** |
| A1 | Related to CARE+ |  | A1.1 |  | |  |  |  |
| A1.2 |  | |  |  |  |
| A1.3 |  | |  |  |  |
| A2 | Related to CARE+ |  | A2.A |  | |  |  |  |
| A2.B |  | |  |  |  |
| A2.C |  | |  |  |  |
| A3 | Related to CARE+ *or* Stretch |  | A3.A |  | |  |  |  |
| A3.B |  | |  |  |  |
| A3.C |  | |  |  |  |
| **Board of Directors** Primary: [President](mailto:president.atdrta@gmail.com) (Ken), [President-Elect](mailto:president.elect.atdrta@gmail.com) (Alex), [Past President](mailto:past.president.atdrta@gmail.com) (Carol), [Director At Large](mailto:director.at.large.atdrta@gmail.com) (Lynn)  *Objective:* | | | | **CARE Foundations:**   1. Board Meetings: Chapter board meets at least once per quarter. 2. Board Roster: Chapter submits an incoming board roster in Excel template. 3. Professional Development: Chapter board members maintain Power Membership (joint chapter/ATD national membership). 4. Position Descriptions: Chapter maintains written position descriptions for elected members. | | | | |
| A4 | 2-year goal |  | A4.A |  | |  |  |  |
| A4.B |  | |  |  |  |
| A4.C |  | |  |  |  |
| *Goals should be Specific, Measurable, Attainable, Relevant, and Time-Based* [*Review CARE + Matrix*](https://d22bbllmj4tvv8.cloudfront.net/25/33/df7a4d60426ca415579817559f3c/2020-care-element-matrix-care-plus.pdf) | | | | | | [*Review Budget*](https://drive.google.com/file/d/1-bWmQNM3YXZw8CUh6nUMMf3WLxyUrvhQ/view) | | |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Governance** Primary: [President](mailto:president.atdrta@gmail.com) (Ken), [President-Elect](mailto:president.elect.atdrta@gmail.com) (Alex), [Past President](mailto:past.president.atdrta@gmail.com) (Carol), [Director At Large](mailto:director.at.large.atdrta@gmail.com) (Lynn)  *Objective:* | | | | | **CARE Foundations:**   1. Operating Plan: Chapter creates and submits an operational plan for the coming year. 2. Governing Documents: The chapter’s mission, vision, and bylaws align with those of ATD, and the chapter meets the ATD branding guidelines. (For 2020, all chapters are required to submit current bylaws.) 3. Government Reporting Requirements: Chapter complies with federal and state reporting requirements. Submission of 990/990-N filings to chapter services is required. 4. Board Selection: Chapter members participate in the nomination or election of the chapter board. | | | |
| **Goals** | | | **Strategies/Tasks** | | | **Budget Line** | **Estimated Cost** | **Due Date** |
| B1 | Related to CARE+ |  | B1.1 |  | |  |  |  |
| B1.2 |  | |  |  |  |
| B1.3 |  | |  |  |  |
| B2 | Related to CARE+ |  | B2.A |  | |  |  |  |
| B2.B |  | |  |  |  |
| B2.C |  | |  |  |  |
| B3 | Related to CARE+ *or* Stretch |  | B3.A |  | |  |  |  |
| B3.B |  | |  |  |  |
| B3.C |  | |  |  |  |
| **Governance** Primary: [President](mailto:president.atdrta@gmail.com) (Ken), [President-Elect](mailto:president.elect.atdrta@gmail.com) (Alex), [Past President](mailto:past.president.atdrta@gmail.com) (Carol), [Director At Large](mailto:director.at.large.atdrta@gmail.com) (Lynn)  *Objective:* | | | | **CARE Foundations:**   1. Operating Plan: Chapter creates and submits an operational plan for the coming year. 2. Governing Documents: The chapter’s mission, vision, and bylaws align with those of ATD, and the chapter meets the ATD branding guidelines. (For 2020, all chapters are required to submit current bylaws.) 3. Government Reporting Requirements: Chapter complies with federal and state reporting requirements. Submission of 990/990-N filings to chapter services is required. 4. Board Selection: Chapter members participate in the nomination or election of the chapter board. | | | | |
| B4 | 2-year goal |  | B4.A |  | |  |  |  |
| B4.B |  | |  |  |  |
| B4.C |  | |  |  |  |
| *Goals should be Specific, Measurable, Attainable, Relevant, and Time-Based* [*Review CARE + Matrix*](https://d22bbllmj4tvv8.cloudfront.net/25/33/df7a4d60426ca415579817559f3c/2020-care-element-matrix-care-plus.pdf) | | | | | | [*Review Budget*](https://drive.google.com/file/d/1-bWmQNM3YXZw8CUh6nUMMf3WLxyUrvhQ/view) | | |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Finance** Primary: [Finance](mailto:vp.finance.atdrta@gmail.com) (Drew), [Admin](mailto:admin@tdrta.org) (Paige)  *Objective:* | | | | | **CARE Foundations:**   1. Budget: The chapter board develops and approves an annual operating budget and makes it available to members. 2. Financial Documents: Chapter submits most recent yearly balance sheet. 3. Financial Documents: Chapter submits most recent profit and loss statement. 4. Financial Review: Chapter board has an internal or external financial review completed annually by a person or group not directly responsible for the management of chapter finances. | | | |
| **Goals** | | | **Strategies/Tasks** | | | **Budget Line** | **Estimated Cost** | **Due Date** |
| C1 | Related to CARE+ |  | C1.1 |  | |  |  |  |
| C1.2 |  | |  |  |  |
| C1.3 |  | |  |  |  |
| C2 | Related to CARE+ |  | C2.A |  | |  |  |  |
| C2.B |  | |  |  |  |
| C2.C |  | |  |  |  |
| C3 | Related to CARE+ *or* Stretch |  | C3.A |  | |  |  |  |
| C3.B |  | |  |  |  |
| C3.C |  | |  |  |  |
| **Finance** Primary: [Finance](mailto:vp.finance.atdrta@gmail.com) (Drew), [Admin](mailto:admin@tdrta.org) (Paige)  *Objective:* | | | | | **CARE Foundations:**   1. Budget: The chapter board develops and approves an annual operating budget and makes it available to members. 2. Financial Documents: Chapter submits most recent yearly balance sheet. 3. Financial Documents: Chapter submits most recent profit and loss statement. 4. Financial Review: Chapter board has an internal or external financial review completed annually by a person or group not directly responsible for the management of chapter finances. | | | |
| C4 | 2-year goal |  | C4.A |  | |  |  |  |
| C4.B |  | |  |  |  |
| C4.C |  | |  |  |  |
| *Goals should be Specific, Measurable, Attainable, Relevant, and Time-Based* [*Review CARE + Matrix*](https://d22bbllmj4tvv8.cloudfront.net/25/33/df7a4d60426ca415579817559f3c/2020-care-element-matrix-care-plus.pdf) | | | | | | [*Review Budget*](https://drive.google.com/file/d/1-bWmQNM3YXZw8CUh6nUMMf3WLxyUrvhQ/view) | | |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Membership** Primary: [Retention](mailto:vp.retention.atdrta@gmail.com) (Dr. Bartlett), [Recruitment](mailto:vp.recruitment.atdrta@gmail.com) (Julie)  *Objective:* | | | | | **CARE Foundations:**   1. Membership Roster: Chapter submits year-end membership roster in Excel. 2. Member Feedback: Chapter board assesses member needs and satisfaction levels at least once per year. 3. Power Membership: Chapter achieves a minimum of 20 Power Members (joint chapter/ATD national members) and 35 percent simultaneously. 4. Power Member Activities: Chapter completes 10 Power Member activities of the chapter’s choice | | | |
| **Goals** | | | **Strategies/Tasks** | | | **Budget Line** | **Estimated Cost** | **Due Date** |
| C1 | Related to CARE+ |  | C1.1 |  | |  |  |  |
| C1.2 |  | |  |  |  |
| C1.3 |  | |  |  |  |
| C2 | Related to CARE+ |  | C2.A |  | |  |  |  |
| C2.B |  | |  |  |  |
| C2.C |  | |  |  |  |
| C3 | Related to CARE+ *or* Stretch |  | C3.A |  | |  |  |  |
| C3.B |  | |  |  |  |
| C3.C |  | |  |  |  |
| **Membership** Primary: [Retention](mailto:vp.retention.atdrta@gmail.com) (Dr. Bartlett), [Recruitment](mailto:vp.recruitment.atdrta@gmail.com) (Julie)  *Objective:* | | | | | **CARE Foundations:**   1. Membership Roster: Chapter submits year-end membership roster in Excel. 2. Member Feedback: Chapter board assesses member needs and satisfaction levels at least once per year. 3. Power Membership: Chapter achieves a minimum of 20 Power Members (joint chapter/ATD national members) and 35 percent simultaneously. 4. Power Member Activities: Chapter completes 10 Power Member activities of the chapter’s choice | | | |
| C4 | 2-year goal |  | C4.A |  | |  |  |  |
| C4.B |  | |  |  |  |
| C4.C |  | |  |  |  |
| *Goals should be Specific, Measurable, Attainable, Relevant, and Time-Based* [*Review CARE + Matrix*](https://d22bbllmj4tvv8.cloudfront.net/25/33/df7a4d60426ca415579817559f3c/2020-care-element-matrix-care-plus.pdf) | | | | | | [*Review Budget*](https://drive.google.com/file/d/1-bWmQNM3YXZw8CUh6nUMMf3WLxyUrvhQ/view) | | |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Programming** Primary: Primary: [Programs](mailto:vp.programs.atdrta@gmail.com) (Nadine), [Logistics](mailto:vp.logistics.atdrta@gmail.com) (Christy)  *Objective:* | | | | | **CARE Foundations:**   1. Chapter Programs: Chapter provides at least six professional development activities per year for members. | | | |
| **Goals** | | | **Strategies/Tasks** | | | **Budget Line** | **Estimated Cost** | **Due Date** |
| C1 | Related to CARE+ |  | C1.1 |  | |  |  |  |
| C1.2 |  | |  |  |  |
| C1.3 |  | |  |  |  |
| C2 | Related to CARE+ |  | C2.A |  | |  |  |  |
| C2.B |  | |  |  |  |
| C2.C |  | |  |  |  |
| C3 | Related to CARE+ *or* Stretch |  | C3.A |  | |  |  |  |
| C3.B |  | |  |  |  |
| C3.C |  | |  |  |  |
| **Programming** Primary: Primary: [Programs](mailto:vp.programs.atdrta@gmail.com) (Nadine), [Logistics](mailto:vp.logistics.atdrta@gmail.com) (Christy)  *Objective:* | | | | | **CARE Foundations:**   1. Chapter Programs: Chapter provides at least six professional development activities per year for members. | | | |
| C4 | 2-year goal |  | C4.A |  | |  |  |  |
| C4.B |  | |  |  |  |
| C4.C |  | |  |  |  |
| *Goals should be Specific, Measurable, Attainable, Relevant, and Time-Based* [*Review CARE + Matrix*](https://d22bbllmj4tvv8.cloudfront.net/25/33/df7a4d60426ca415579817559f3c/2020-care-element-matrix-care-plus.pdf) | | | | | | [*Review Budget*](https://drive.google.com/file/d/1-bWmQNM3YXZw8CUh6nUMMf3WLxyUrvhQ/view) | | |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Communication** Primary: [Media Marketing](mailto:vp.media.marketing.atdrta@gmail.com) (Molly), [Communications](mailto:vp.communications.atdrta@gmail.com) (Jazmin)  *Objective:* | | | | **CARE Foundations:**   1. Website: Chapter maintains a current website with up-to-date information. 2. Member Communication: Chapter distributes a communication piece to members at least once per quarter that features chapter and ATD programs and initiatives. 3. Annual Report: Chapter board shares an annual report at least once per year with members noting: membership numbers, financial performance, and progress toward annual goals. 4. National Support: Board members hold, at minimum, an annual phone call with their chapter relations manager to identify opportunities for support. | | | |
| **Goals** | | | **Strategies/Tasks** | | **Budget Line** | **Estimated Cost** | **Due Date** |
| C1 | Related to CARE+ |  | C1.1 |  |  |  |  |
| C1.2 |  |  |  |  |
| C1.3 |  |  |  |  |
| C2 | Related to CARE+ |  | C2.A |  |  |  |  |
| C2.B |  |  |  |  |
| C2.C |  |  |  |  |
| C3 | Related to CARE+ *or* Stretch |  | C3.A |  |  |  |  |
| C3.B |  |  |  |  |
| C3.C |  |  |  |  |
| **Communication** Primary: [Media Marketing](mailto:vp.media.marketing.atdrta@gmail.com) (Molly), [Communications](mailto:vp.communications.atdrta@gmail.com) (Jazmin)  *Objective:* | | | | **CARE Foundations:**   1. Website: Chapter maintains a current website with up-to-date information. 2. Member Communication: Chapter distributes a communication piece to members at least once per quarter that features chapter and ATD programs and initiatives. 3. Annual Report: Chapter board shares an annual report at least once per year with members noting: membership numbers, financial performance, and progress toward annual goals. 4. National Support: Board members hold, at minimum, an annual phone call with their chapter relations manager to identify opportunities for support. | | | |
| C4 | 2-year goal |  | C4.A |  |  |  |  |
| C4.B |  |  |  |  |
| C4.C |  |  |  |  |
| *Goals should be Specific, Measurable, Attainable, Relevant, and Time-Based* [*Review CARE + Matrix*](https://d22bbllmj4tvv8.cloudfront.net/25/33/df7a4d60426ca415579817559f3c/2020-care-element-matrix-care-plus.pdf) | | | | | [*Review Budget*](https://drive.google.com/file/d/1-bWmQNM3YXZw8CUh6nUMMf3WLxyUrvhQ/view) | | |