



## ATD Treasure Valley Operating Plan 2020

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# Operating Plan 2020



## Executive Summary

The ATD Treasure Valley Chapter has set some *very* aggressive goals for 2020. There is a lot of growth and opportunity in the Treasure Valley with the influx of development and new and growing businesses. The demand is high to help develop and support current Talent Development professionals, young professionals, and those collegiate students actively pursuing their education in Talent Development. Through brand strengthening, outreach, and diversifying the TD opportunities the Chapter offers to Members and Non-Members, a main goal is to increase our members by 50% and target Corporate, Student, Young Professionals, and Individual memberships in 4 different Outreach events in the Treasure Valley.

Lastly, the Board recognizes the importance to our Chapter and Members of building and facilitating a Member Centric Community with the Chapter and the Treasure Valley.

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## Mission and Vision

**Mission:** Fostering an environment where learning professionals thrive and develop.

**Vision:** To be a worldwide leader in workplace learning and performance.

ATD is “the voice of the profession”; with three key audiences:

- The workplace-based view on talent development inside the U.S.
- Provide the media with insight into the trends affecting workplace learning and performance.
- Collaboration with associations, organizations, and educational institutions around the world.

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## Board Members

President: Julie Hawk

President-Elect: Vacant

Past President: Jackie Hopper

Director of Programs: Kayla Jamison

Director of Communications: Jaymie Rietmann

Director of Membership: Tara Deiss

Director of Technology: Tyson Chaplin

Director of Outreach: Bob Rock

Director of Finance: Logan Morris

Director of Marketing: Leslie Brown

Director of Networking: Josh Orr

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## Annual Goals

### Board Goals

- Train each Board member how to design their respective role using Wild Apricot (i.e., Program Director designs Program Calendar and Member Events)
- Develop a Marketing Plan to Strengthen Brand in the Treasure Valley
- Create Board Leader Onboarding
- Attend HRATV Conference to Build Brand, Create Treasure Valley Talent Development Awareness, Recruit a minimum of 10 New Members

### Chapter Goals

- Increase membership by 50% = 30 new members

### Communications Goals

- Design and administer a quarterly newsletter to Chapter members.
- Design and implement a Board meeting agenda and minutes template.

### Membership and Retention Goals

- Create an offboarding survey to administer to non-renewing members.
- Design and deliver a new Chapter member onboarding program.

### Program Goals

- Host eight professional development events that support Talent Development community in the Treasure Valley.
- Coordinate a dedicated event to introduce to the Treasure Valley the scope of Talent Development.

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## Board Strategy

Goal: Increase Membership by 50% = 30 New Members

Objective: Increase Chapter membership by 50% from 60 to 90 members by the end of December 2020.

- Coordinate the following Membership and Outreach events to recruit new members (Corporate, Student, and Individual):
  - BSU OPWL Department to target Students
  - CWI or NNU to target students
  - HRATV to target all demographics
  - Boise and West Ada School District to target Corporate and Individuals
  - Boise Start Up Week to target all demographics
  - Two Local Businesses to target Corporate and Individuals

Tasks and Owners: All Board members will need to be involved in the events.

- Outreach, Communication, or President will contact OPWL Department to inquire if we can setup a booth to market the Chapter
- Finance or President will purchase an HRATV booth by February 3rd to coordinate booth responsibilities, purchase swag, and determine the most effective ways to attract people to our booth
- Outreach or President will contact Boise and West Ada School District to inquire about doing a lunch and learn event or table setup for people to ask TD and membership questions
- Outreach will need to look into the details to determine if Boise Start Up Week is an appropriate event for us to pay for booth sponsorship
- Each Board person will need to identify two Local Businesses to target Corporate and Individuals

Timeline: All above events to be completed by December 30, 2020.

### **Strategy 1**

Each month, each Board director will email 5-7 professionals from their Linked In connections that they know or don't but that are local to the Treasure Valley. The email will provide an offer to come try out the Chapter as a guest. It will also include our Chapter website referencing the Events, Board members, and Member Benefits sections. The email will be sent on the same recurring day of every month for the year of 2020.

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## ***Strategy 2***

Purchase a sponsorship at the HRATV conference April 17, 2020 that provides us a booth space. This event is expected to have 250-400 people attend. We will market the following:

- The importance of TD to organizations
- The importance of TD to leaders
- The importance of TD to employees

During the conference at our booth, Board members will rotate through the booth to maintain momentum for those they meet and engage. While at our booth, Board members will collectively:

- hand out branded swag
- collectively handout 50 guest passes
- advertise the membership benefits and options
- display our website on a laptop
- provide a signup sheet to those businesses who might be interested in learning more about us to attend their organization to recruit new Corporate and/or Individual Memberships

## ***Strategy 3***

Attend Boise Start Up October 2020 to create brand awareness in the Treasure Valley.

## ***Strategy 4***

Request to host a couple of membership recruitment events at BSU possibly in the Student Union building for Business, Marketing, Communication, OPWL, and other undergraduate and graduate level programs.

During the event, the Board will collectively work to:

- List the benefits of being a member of the TD Community in the ATD Treasure Valley Chapter
- Provide Student pricing
- Explain our mentor program available to graduate level students
- List potential volunteer opportunities
- Provide a list of Program Events



## **Strategy 5**

Attend two Local Businesses to advertise the Chapter, its benefits, the benefits of TD in the TV, membership prices, Chapter Events, and answer any questions.

## Board Leader Succession Planning

Goal: Develop Board Leader 30, 60, 90 Day Onboarding

### **Strategy 1**

Create Board Member Onboarding for 30, 60, 90 days in Word document that Board Leaders are required to complete annually, and sign an acknowledge and agree form submitted to the President.

Objectives: Create a 30, 60, 90 day onboarding program for new and transitioning Board members to identify the role, responsibilities, and expectations.

#### Tasks and Owners

- President is responsible for identifying, designing, and finalizing onboard process.
- All Board members are responsible for providing input and suggestions.
- All Board members are responsible for completing the onboarding within 45 days of the new year or 45 days of being voted in as a Board leader.

Timeline: Onboarding draft first pass is due by January 20, 2020. Board members are expected to read, review, and provide feedback by January 31, 2020.

Goal: Onboard and Recruit Networking Support for Board Leader Directors

### **Strategy 1**

Onboard and recruit networking positions that allow those persons to experience leader responsibilities and determine if they are interested in a Board Leader position.

Objectives: Ensure the Chapter has cross communication for all incoming email.

#### Tasks and Owners

- All Board Leaders will need to assess if their respective warrants a networking support person
- All Board Leaders will help each other to work identify potential candidates for support

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positions

- Communication and President will need to draft benefits of assuming a coordinator position and advertise on our website, at monthly and other events, and through Outreach

Timeline: Onboarding draft first pass is due by January 20, 2020. Board members are expected to read, review, and provide feedback by January 31, 2020.

Goal: Train Board Leaders to Use and Update Wild Apricot for Their Respective Role

## **Strategy 1**

Technology Director will develop elearning content for Board leaders to complete.

Objectives: Each Board member is to learn how to design, edit, and update their respective sections of the ATD TV website.

Tasks and Owners: All Board Members in good standing.

- Technology Director will create video modules to train the Board how to use WA

Timeline: February 28, 2020

Goal: Develop a Marketing Plan to Strengthen Brand in the Treasure Valley

## **Strategy 1**

Onboard an experience Marketing Director to help strategize and implement a marketing plan and calendar.

Objective: Create a Marketing strategy and calendar to strengthen our brand in the Treasure Valley.

Tasks and Owners:

- Marketing Director, Communication Director, and President will work to create a strategy
- All Board members will be responsible to execute the strategy according to the calendar

Timeline: March 02, 2020

## Communications Strategy

Goal: Design and administer a quarterly newsletter to Chapter members.

### **Strategy 1**

Onboard a successful Communication Director that partners with the rest of the Board, Chapter Members, benchmarks with other Chapters to write and administer a quarterly newsletter.

Objective: Administer a quarterly newsletter to the Chapter that recognizes the Members, the Board, includes local TD events, Chapter events, National news to strengthen the ATD TV brand.

Tasks and Owners: Communication Director, Input from Board and Chapter Members

- Solicit ideas and input from Board members
- Solicit ideas and input from Chapter members
- Outline potential newsletter topics
- Determine how to recognize Chapter members
- Create a template (must know, nice to know information)
- Benchmark with other Chapters

Timeline: March 02, 2020

Goal: Design and implement a Board meeting agenda and minutes template.

### **Strategy 1**

Create a meeting minutes template that is user friendly for Board Leaders to easily complete and that is easily accessible through the use of Excel and Wild Apricot.

Objective: Design and implement a Board meeting agenda and minute template that:

- Streamlines the meeting agenda process for all Board members to contribute
- Consolidates annually the meeting agenda and minutes
- Is centrally located and easily accessible to all Board members
- Can be posted on the Chapter website and made available to Chapter members (only)

Tasks and Owners: Communication Director, President

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- Design a template that is user friendly, includes all Board members section, provides the location and meeting logistics

Timeline: January 17, 2020

## Membership and Retention Strategy

Goal: Create Onboarding for New Chapter Members

### **Strategy 1**

Use PowerPoint, Articulate, and other solutions to capture website demonstration to navigate Chapter website, leverage any National resources, etc.

Objective: Create a new Chapter member onboarding program that is focuses on Chapter member benefits to create engagement.

Tasks and Owners: Membership Director, President

- Create new member onboarding content framework
  - The Board
    - Board Members
  - The Chapter
    - Mission, vision, history
    - Operating Plan for 2020
    - Bylaws
    - Financials
  - Members Only
    - Member Directory
  - Membership
    - Types and benefits of Membership
    - National Membership
    - CHIP Code
  - Chapter website (guided demo)
    - Profile, privacy policy
- Onboarding evaluation
- President is responsible for identifying, designing, and finalizing onboard process.

Timeline: March 02, 2020

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Goal: Create an Offboarding Survey to Administer to Non-Renewing Members

## **Strategy 1**

Objective: Design a quick 3-5 question offboarding survey that takes less than 3 minutes to complete and administer to non-renewing members to capture the top 3 contributors for that result in non-renewal.

Task and Owners: Membership Director, President

- Design survey questions in Survey Monkey
- Set reminder date on calendar to administer survey every Friday
- Review data once per month and report analysis findings and trends at every Board meeting

Timeline: January 31, 2020

Goal: Attend HRATV Conference to Build Brand, Create Treasure Valley Talent Development Awareness, Recruit a minimum of 10 New Members

## **Strategy 1**

Commit to sponsor and attend the HRATV conference in April 2020.

Objectives: Attend our first ever HRATV annual conference April 17, 2020 to:

- build and strengthen our local brand awareness
- display the benefits of ATD TV TD Chapter membership
- display the ATD Capability model
- provide an event calendar
- allow membership enrollment at the booth

Tasks and Owners

- This will be a collective effort by all Board members.

Timeline: April 17, 2020

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## Programming Strategy

Goal: Host Eight Professional Development Events that Support Talent Development in the Treasure Valley

Objective: Identify and coordinate presenters for eight events that align with the Talent Development scope and/or the National Capability Model.

Tasks and Owners: All Board Leaders, Program Director

- Connect with other Talent Development professionals to determine what topic they want to deliver and engage the Chapter members and guests
- Coordinate the dates per presenter.
- Update the website with the presenter information.

Timeline: October 29, 2020

Goal: Host a Dedicated Talent Development Awareness Event

Objective: Explore through conversation and experience what talent development entails as it relates to employees, leaders, the organization in a monthly event.

Tasks and Owners: Program Director, President, Networking Director, Other Treasure Valley TD professionals, Chapter Members

- Design general TD outline
- Determine how Capability Model aligns and supports TD
- Assess members through a website poll their TD knowledge level to determine what aspects of TD they want to learn

Timeline: November 19, 2020