



# Greater Birmingham Chapter of ATD 2021 OPERATING PLAN



# Greater Birmingham Chapter of ATD

## 2021 OPERATING PLAN

*ATD chapters are required to submit their 2021 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](#) (CRM) if you have additional questions or would like to receive a copy of the operating plan that your chapter submitted in 2019.*

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### Mission and Vision

#### *Mission*

#### Theme

We discussed our 2021 theme. **Strength**

- Recover
- Resilience
- Rise Up (Pheonix)

Strength was approved. We will use the website's scrollbar to display the word strength and the board members' favorite quotes about strength.

#### *Vision*

Empower learning and development professional to achieve excellence.

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### Board Member Initiatives

#### **President**

Scholarship for Training and Development Professionals

#### **VP of Member Relationships/Administration (President-Elect)**

The creation of a Leadership and Development Workshop

#### **VP of Programs**

#### **VP of Communications & Technology**

Establish CPTD & APTD Study Group & Improve Member Engagement

#### **VP of Strategic Relations**

#### **VP of Finance**

#### **Past President/Advisor**

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### Annual Goals

- Goal* - We discussed the possibility of continuing virtual sessions into the 2nd quarter of 2021. We also wanted to discuss the possibility of utilizing Facebook as a platform for joining the meetings virtually.
  - Find sponsors to assist with equipment for our Hybrid meetings starting the second quarter.
  - VP Strategic Relationships will be assisted by our board to achieve this goal by the end of the first quarter 2021.
- Goal* - Scholarship for Training and Development Professionals
  - Assist professionals with funds when training budgets are cut and provide funding to attend local ATD chapter meetings.
  - Tasks and Owners
  - Timeline
- Goal* - *CPTD and APTD Study Groups*
  - Objectives  
Increase member interest in the CPTD and APTD certifications.  
Increase the number of members with CPTD and APTD designations.
  - Tasks and Owners  
Acquire a chapter copy of the CPTD and APTD study materials.  
Develop a study schedule.
  - Timeline  
Schedule set by end of 1st quarter 2021  
1st session 2nd quarter of 2021
- Goal* - *Improve Member Engagement*
  - Objectives  
Offer members multiple avenues to communicate with each other and access chapter information.

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- Tasks and Owners
  - Setup chapter Slack channel.
  - Redesign website.
  - Develop onboarding for new members.
- Timeline
  - Setup & communicate details of chapter Slack channel by EOM January 2021.
  - Redesign the website and develop onboarding by mid-February 2021.
  - Preview the redesigned site at the February 2021 virtual event.

### 5. *Goal*

- Objectives
- Tasks and Owners
- Timeline

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### Communications and Marketing Strategy

*The Vice President of Communication and Technology will redesign all email templates to incorporate more images, reduce text, and highlight timely information. She will also establish a schedule to ensure that emails are distributed in a timely manner.*

#### **Goal**

Increase email open and link click rate by 25%.



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### Recruitment and Retention Strategy

**Example: Send a monthly communication to prospective chapter members.**

*With the support of the Membership Committee, the vice president of membership will identify prospective members by leveraging the ATD state list, LinkedIn, and Wild Apricot records of nonmembers who have recently interacted with the chapter (by attending an event, opening an email, or participating in a webcast). The vice president of membership will develop a template email that will be shared with prospects on a monthly basis.*

#### **Goal**

Description of related efforts.

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Description of related efforts.



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### Succession Planning Strategy

**Example: Recruit twelve new volunteers for the chapter by December 31, 2021.**

*Each month, the director of volunteers will compile a list of chapter members who have attended two or more events in the last 60 days. This list will be shared monthly with a different board member who will be charged with approaching that person at a chapter event to inquire about his or her interest in volunteering for the chapter. The director of volunteers will also distribute a quarterly newsletter to share information about volunteer opportunities and open board roles and to recognize existing volunteers.*

#### **Goal**

Description of related efforts.

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