**2012 SOS Submission: ASTD Capítulo de Puerto Rico, Inc.**

**Partnership with SHRM’s Puerto Rico Chapter**

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| **Submission Date:**  **Chapter Name: ASTD Capítulo de Puerto Rico, Inc.** **Chapter ID: 2146** **Chapter Location: Puerto Rico** **Chapter Membership Size: 70-75** | **Contact for this Submission: Norma Dávila** **Email Address: normadavila47@gmail.com** **Phone Number: 787-375-0310** **Chapter Title: President** **Chapter Website URL: www.astdpr.org** |

**Description of Effort:** Our Chapter established a partnership with SHRM’s Puerto Rico Chapter to hold its Annual Conference during one of SHRM’s Puerto Rico Chapter’s Conference days and at the same venue. For the last three years, our Conference has taken place during the first day of SHRM’s Conference. We hold our separate program, usually two morning sessions, lunch, and an afternoon session, and join SHRM’s Conference for the closing plenary of the day and reception.

**Need Addressed:** Many participants of our Chapter’s Annual Conference also attend SHRM’s Conference which usually draws around 800 attendees. This arrangement makes it easier for participants to attend both meetings if they wish to do so because they start with our Chapter’s Annual Conference and the following days they can attend SHRM’s Conference. The Chapter receives benefits from economies of scale for publicity, hotel guest rooms, parking fees, audiovisual support, food and beverages, and room rental. In turn, SHRM’s Chapter receives publicity, attendees, credit for hotel rooms from the room block, and other hotel expenses paid by our Chapter.

**Does this effort align with your chapter mission?** Yes

**Does this effort align with ASTD's mission?** Yes

**Target Audience:** Current and Potential Chapter Members who attend SHRM’s Puerto Rico Chapter Annual Conference

**Costs/Resource Use:** Our budget for the Conference is around $10,000. This amount includes publicity, meals and breaks, parking fees for guest speakers, token gifts for guest speakers, and rental of audiovisual equipment. We cover expenses through sponsors who contribute funds as well as who contribute services in exchange of publicity, through registration fees, and through rental of table tops to companies or individuals who wish to promote their products and services. We cultivate our relationships with our sponsors throughout the year to ensure continuity in funding and support. Our President-Elect starts getting in touch with current and potential sponsors before becoming President.

Our Board handles most tasks related to the Conference, including developing the program, writing promotional pieces, establishing partnerships, collecting and distributing giveaways, printing materials, negotiating fees with the hotel and other suppliers, and logistics. SHRM ‘s Chapter provides support with e-mail blasts, advertising, and promotional pieces. Teams of two or three undergraduate students in fields related to training and development have supported the registration process and other logistics during the last two Conferences; their faculty advisors are either regular Chapter members or Board members and see this experiences as part of their formation as future professionals.

**How did you implement?** A high level of overlap in membership exists between both organizations.Wanda Piña-Ramírez, Past President, is a Board Member of SHRM’s Puerto Rico Chapter. She developed and presented the idea to both Boards and it was approved. After the success of the first year, SHRM’s Chapter assumes that the ASTD Conference will be part of its Conference every year. Our Chapter plans its Conference and maintains SHRM’s Conference Committee informed of what is going on as well as of its needs for support and coordination of specific activities throughout the year. Further, all contacts with the hotel are coordinated with and/or informed to SHRM’s Conference Committee to avoid miscommunications.

**What were the Outcomes?** The main outcomes have been: increased awareness of the Chapter and its professional development programs among SHRM’s Chapter members, increased visibility for sponsors, long-term sponsor support, additional members, increased interest serving as Chapter volunteer as a result of the work that they see being done, cost savings related to publicity and venue, very positive feedback about the Conference in general, and higher expectations about the quality of the program for the following year.

**Lessons Learned: Some of the lessons that we have learned are:**

* Start planning early.
* Start small (one day program, no concurrent sessions) and plan to scale-up as your needs change.
* Approach SHRM’s Chapter focusing on benefits for them.
* Keep SHRM’s Chapter informed of your progress and of any issues that need to be addressed.
* Build and maintain a good relationship with the hotel and other suppliers.
* Appoint a primary contact person for the hotel for the Conference so that the Board can take care of other matters such as welcoming participants and guest speakers.
* Approach your sponsors as early as possible and provide them with multiple opportunities for publicity throughout the year.
* Offer to write promotional pieces for newspapers in exchange for free advertising.
* Gather as many donated or purchased items for prize drawings as possible; participants look forward to certificates for X service or the latest book on Y topic.
* Never underestimate the complexity of logistics.
* Avoid leaving tasks to be completed “early in the morning of the Conference” to solve any situation that arises.
* Budget for at least one hotel room for one or two volunteers for the night before the Conference so that they can help to set up the room and giveaways that night.
* Cover parking expenses for Board members and other volunteers.
* Participants appreciate simple meals and snacks; there is no need to be fancy and overspend.
* Plan for longer breaks than anticipated; participants enjoy seeing each other and building connections.

**Please list the specific ASTD chapter resources that helped guide you in the process of completing this best practice:**

* Jennifer Tomarchio
* Brandon Grubesky
* Sarah Jeffcoat

***Please email completed forms to*** [***SOS@astd.org***](mailto:SOS@astd.org) ***along with any supporting documents.***