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| **Chapter Name** | Detroit ATD |
| **Chapter Number (ex. CH0000)** | CH5014 |
| **Chapter Location (City, State)** | Detroit, Michigan |
| **Chapter Membership Size** | Medium (101 - 349) |
| **Contact Person for this Submission:** | Larry Gelfund, Past President |
| **Email Address:** | [Laredo1@core.com](mailto:Laredo1@core.com) |
| **Phone Number:** | (248) - 231 - 3858 |
| **Chapter Board Position:** | Past President and Current Member at Large |
| **Chapter Website URL:** | <http://www.detroitastd.org/> |
| **Submission Title:** | ATD Detroit Strategic Plan process |
| **Submission Description:** | This will describe the process of developing our chapter strategic plan, the resulting plan, its implementation and how we use it as a board at monthly meetings to keep us focused on or mission, and chapter member’s needs, wants and desires. It also assists us in the administrative management of the chapter to ensure we achieve CARE requirements. |
| **Need(s) Addressed? Please be specific.** | ATD Detroit has experienced a resurgence over the last 7 years following the near collapse of the chapter. With a concerted effort, a board of 3 drove the resurgence to a board of 6 in the first year and regained close to 100 members. Additionally, it conducted regularly scheduled member meetings and programs within 90 days of the rebirth. The bylaws and job descriptions were updated, the website was relaunched and the membership continues to grow the chapter to now over 200 members. The 2016 board now numbers 15 members and a paid chapter administrator that includes President, Past President and President Elect, VP’s in Finance, Administration, Marketing and Administration, Membership, Programs and Events, Technology and Career Development. We have a director of Social Media and a Director of Sponsorship. We also have 3 Members-at-Large. We have maintained a breakeven P&L. This past year we received chapter of the month and an SOS recognition. We also had 6 Board Members at Chapter Leader Day and a contingent of 29 at ICE and a fully seated board voting before the end of the year. We also completed our annual strategic planning meeting a month early in December. The 2016 strategic plan was reviewed and ratified at the January 5 Board meeting and presented to the membership at the January member meeting the following week. All of these are firsts making 2015 a banner year for ATD Detroit.  Considering the growth and success of the chapter, our board had to re-group and focus our efforts on goals that would take the chapter to the next level for our members, meet our chapter mission statement and the mission statement of ATD. The decision was to create a strategic plan that would be developed by the board and zero in on building value for chapter’s member, meet CARE requirements and guide the board members through their roles in chapter leadership management. |
| **What is your chapter's mission?** | Mission Statement: To promote the growth of workplace learning and performance by providing members with professional development opportunities, targeted services, and relevant events that impact business goals. |
| **How does this effort align with your chapter's mission (Please provide specific examples)?** | We have 4 distinct defined Key Result Area with goals. The definitions were developed solely to support the Mission statement, then goals were developed that support the Key Result Area definition. The process used and the resulting plan will show the vertical integration that exists from a goal to the Key Result Area and then to both the chapter and ATD mission statement. |
| **National ATD's mission is to "empower professionals to develop talent in the workplace". How does this submission align with ATD's mission? Please provide specific examples.** | As discussed above, our goals align vertically with both the chapter and ATD Mission. In each area we serve our membership with engaging resources and programs that inform and develop skills that empowers them to use at work to develop talent, and in life in the pursuit of providing effective learning to others. The Key Result Areas and goals are a direct result of aligning with both mission statements. Specific examples are defined in the resulting strategic plan Key Result Area definitions and goals found below them. The completed plan is attached. |
| **Target Audience: (Who will benefit/has benefited from this effort?)** | Members, all Board Members, the chapter as a whole and ATD |
| **Costs/Resources Used: (include any details regarding use of resources including monetary, donations, contributions, volunteer hours, people resources, etc. and how you went about getting these resources)** | - 6 hours of board member time - Continental breakfast - $50  - Lunch - $100 - Office supplies - $25 |
| **How did you implement: (please give a brief description)** | 1. A week prior to our meeting a preparation email was sent to all board members by the session facilitator. See attached  a. Pre-meeting memo b. Meeting Agenda and thought starters  2. 14 of our 15 board members gathered at our President Elect’s house on Saturday morning at 8:30 AM.   3. We began the session with a review of chapter Mission Statement. The facilitator challenged the group to identify “themes” contained in the mission statement that represented what it means as a successful chapter. We recorded the responses on a flipchart. The flipchart listed 8 themes.  4. The facilitator defined what a Key Result Area (KRA) was as a broad area of scope and responsibility as chapter leaders to manage and challenged the group to whittle the list down through open discussion to 4 – 5 themes. These themes would become KRA’s. The resulting final list was: a. Membership b. Marketing, Communication and Technology c. Programs and Events d. Leadership and Administration  5. The next step was to assign “Owners” to the most appropriate board member. This Owner would have the role on monitoring, managing and leading the KRA’s definition, goal setting and reporting process. The KRA’s were assigned as follows: a. Membership – VP Of Membership b. Marketing, Communication and Technology – VP of Marketing  c. Programs and Events – VP of Programming and Events d. Leadership and Administration – Chapter president  6. Next, 20 minutes were allotted to each KRA. In open group discussion led by the Owner VP, ideas and thoughts were discussed of what the definitions and characteristics of success in the KRA theme would be described as. The facilitator captured the open thoughts on flipchart.  7. The next step each VP Owner was assigned 2 – 3 other board members in a break out session for their KRA. The objective of the individual breakout was to draft SMART goals that would support the defining characteristics of success for that KRA. Member survey results were reviewed as part of the goal setting process as well.   8. Next, the board regrouped and each VP Owner was given the opportunity to present their rough drafts of goals. Other board members were allowed to ask questions and challenge the thinking of each group.  9. Following the presentation, the VP submitted their goals to the facilitator for editing, recording and refining. The facilitator discussed next steps and the meeting was adjourned at 3PM.   10. Following the meeting, the facilitator formalized the flipcharts and notes:  a. Drafted a KRA definition from notes for each KRA b. Drafted the goals written c. Assembled the work into the Strategic Plan template.  11. Each VP was sent a copy of their respective KRA definition and goals, completed edits and refinements, and returned them to the facilitator.  12. The facilitator assembled all of the final KRA definitions and goals into the Strategic Plan template and distributed it to all board members for review in preparation for the January Board meeting.   13. In the January board meeting each VP was given 15 minutes to accomplish the following:  a. Answer any questions about the goals (Some minor edits and wording was completed.) b. Assign or request leads and/or support from other c. Identify any budgetary needs to the VP of Finance for the preparation/modification of the annual budget.  14. The facilitator completed the edits, entered the leads and support onto the form live.   15. The Strategic Plan was modified into a “Membership Handout” that listed the KRA’s and goals and it was posted to the website, placed on the member meeting resource table in Reception and placed at every chair in the first quarter.   16. For future Board meetings the Strategic plan is updated. The plan is sent to the KRA Owners to update their page. They are asked to colorize it according to the key on the second page and add any milestones to the goal. Each Owner is giving up to 15 minutes of the board meeting and only discusses any goals that are behind goal dates and milestones (Yellow or Red) to rally resources and help where needed. The goal is not changed, only the colors indicating its status. |
| **What were the Outcomes: (Please include hard data regarding financial gains, membership increases, target audience satisfaction levels, publicity for the chapter or for the profession, etc.)** | • A completed Strategic Plan with KRA’s and Goals • Member communication piece  • The original need of focus for each VP on valid goals • Specific criteria and review process of how we are leading the chapter and meeting our mission statement |
| **Lessons Learned: (hints and tips for other chapters who may be considering a similar effort)** | - Use an experienced facilitator that is unbiased - Begin with the mission statement - Use Member Survey findings for goals |
| **Please list the specific ATD chapter resources that helped guide you in the process of completing this best practice (e.g. people, documents, policies, by-laws, etc.):** | • Board member time • Meeting food • Meeting office supplies • Strategic Planning facilitator (A Past President) |
| **Please attach any documents that help support this submission: (additional documents should be sent to** [SOS@td.org](mailto:SOS@td.org)**)** | [ATD Detroit 2016 Strategic Plan Scorecard, January Update.doc](https://forms.td.org/download.php?q=Zm9ybV9pZD0xMSZpZD04NiZlbD1lbGVtZW50XzE2) |
| **additional supporting documents:** | [ATD 2016 Strategic Plan, Member Handout.docx](https://forms.td.org/download.php?q=Zm9ybV9pZD0xMSZpZD04NiZlbD1lbGVtZW50XzIy) |
| **additional supporting documents:** | [SOS Suporting correspondence.docx](https://forms.td.org/download.php?q=Zm9ybV9pZD0xMSZpZD04NiZlbD1lbGVtZW50XzIz) |
| **How did you become familiar with the Sharing Our Success (SOS) program?** | Other |
| **If you selected "other", please explain your response.** | Have submitted inthe past and at Chapter Leader Day |