

**[CHAPTER NAME]**

**[20XX] OPERATING PLAN**

*ATD chapters are required to submit their operating plans for the upcoming year 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*](http://www.td.org/crm) *(CRM) if you have additional questions or would like to receive a copy of the operating plan that your chapter submitted last year.*

**Mission and Vision**

*Mission*

*Vision*

**Board Member Initiatives**

President

President-Elect

Past President

VP of Programs

VP of Communications

VP of Membership

VP of Technology

VP of Administration

**Annual Goals**

1. *Goal*

* Objectives
* Tasks and Owners
* Timeline

1. *Goal*

* Objectives
* Tasks and Owners
* Timeline

1. *Goal*

* Objectives
* Tasks and Owners
* Timeline

1. *Goal*

* Objectives
* Tasks and Owners
* Timeline

1. *Goal*

* Objectives
* Tasks and Owners
* Timeline

**Communications and Marketing Strategy**

## Example: Increase open rates for the monthly newsletter by 15 percent by Q1 2025.

*Working collaboratively, the vice presidents of marketing and technology will redesign the newsletter format to incorporate more images, reduce text, and highlight timely information. They will also establish a schedule to ensure that the newsletter is distributed on the same date and time each month.*

## Goal

Description of related efforts.

## Goal

Description of related efforts.

**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.

## Goal

Description of related efforts.

**Succession Planning Strategy**

## Example: Recruit twelve new volunteers for the chapter by December 31, 20XX.

*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.

## Goal

Description of related efforts.

***OPTIONAL***

**Engagement Strategy**

## Example: Create a recognition program by Q2 2025 to recognize the chapter’s most engaged members.

*The vice president of membership will create a recognition program to reward members for attending chapter events, volunteering, and contributing content to the chapter’s blog or newsletter. As members continue to engage, they will receive progressively valuable incentives.*

## Goal

Description of related efforts.

## Goal

Description of related efforts.

***OPTIONAL***

**Programming Strategy**

## Example: Host six professional development events and two dedicated networking events by December 31, 20XX.

*In coordination with the Programming Committee, the vice president of programs will use the ATD Capability Model and data from the most recent member survey to identify six topics of interest to local talent development professionals. These topics will be used to identify speakers and content for six different professional development events to be held throughout the year. The chapter will also organize two dedicated networking events to provide members opportunities to get to know one another, share best practices, and introduce colleagues and guests to the chapter.*

## Goal

Description of related efforts.

## Goal

Description of related efforts.