**2010 SOS Submission: Central Indiana Chapter**

**Board Development: Chapter Mission**

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| **Submission Date:** 3/12/10 **Chapter Name:** CIASTD **Chapter ID:** CH5010 **Chapter Location:** Indianapolis **Chapter Membership Size:** 364 | **Contact for this Submission:** David Wachtel **Email Address:** david.wachtel@hautacamconsulting.com **Phone Number:** 317-679-5216 **Chapter Title:** VP Admin & Volunteer Coord. **Chapter Website URL:** www.ciastd.org |

**Description of Effort:** Through an interactive process as a board, we used the majority of our 2010 Board retreat to update our mission and vision to reflect the current state of the chapter; we also used this time to develop a set of values to support our ways of working together.

**Need Addressed:** Half of our board turned over at the end of 2009. Our former mission and vision statements had not been updated since 2006, and while we had identified a set of board values during our board retreat at the end of 2008, the list was lengthy and there was not buy in for the values across the board. The updating of mission, vision, and values also served as a development project for the board and provided a great opportunity for board members to get to know each other. It was an extremely effective way to get to know others’ perspectives and talk about how we will work together. It is important for the board to be recognized as one voice to our membership.

**Does this effort align with your chapter mission?** Absolutely, as it IS the mission. When reviewing our mission/vision in 2009, we realized that it no longer represented why we existed, so the chapter leadership decided to enhance it through the course of this project.

**Does this effort align with ASTD's mission?** Yes. In fact, in the attached documents you will see that we began with the ASTD mission as our starting point (strategic planning form). We began the discussion around what the ASTD mission statement meant to us locally, then moved to the things we need to focus on in 2010 and how we align with the mission as a chapter.

**Target Audience: The CIASTD Board and our membership.**

**Costs/Resource Use:** We began this project in November of 2009 with discussion as a board. For the first time, we invited the future board members to the November board meeting so they could get a feel for how our meetings were conducted. In addition to getting introduced to the existing board’s culture, board members were asked to think about key items that you will see on the “preparation form” attachment.

The chapter president assigned pre-work to all 2010 board members for our December board retreat related to the mission/vision/values. These included:

* What the chapter means to each of us
* What we perceive our board roles to be
* How we will work with other board members

We were asked to look at the ASTD mission and consider what this means to us as a local chapter, and what our focus should be in 2010.

Our last task was to look at the current (old) mission/vision/value statements and decide if change was needed. Indeed all of the board members agreed this needed to be addressed.

In the midst of this process we had a separate orientation for new board members where we, among other things, briefly discussed this project. While everyone had been members of the chapter, the new board members had a chance to learn more about how the board functioned in the past and talk about what we might want to do differently in the future.

At the December board retreat we spent the majority of our time working on this. We broke into small groups to begin to work on statements (starting with the current mission/vision) we felt reflected what we perceived our chapter to represent, what it should do, and how we aligned with the ASTD mission.

We mixed the groups several times to get different perspectives. Eventually, we came together as a large group to look at the various statements that had been developed. Out of these we were able to come up with statements and a series of values that everyone believed in and felt the chapter would embrace.

We agreed to “sleep on this” and finalize it in January. During the month between the retreat and the January meeting where we voted to make this (CIASTD Final Form attachment) our statement, there was more discussion off line and our president and president-elect met to condense all the information and finalize the recommendation that we currently have today. For comparison, on the second page of the strategic planning form attachment you will see the “old” version. The “final” file shows what we developed.

Costs and resources were limited to time and effort.

**How did you implement?** We met again in January to make sure we were all still in agreement, and we were. During the month between the retreat and the January meeting where we voted to make this (CIASTD Final Form attachment) our statement, there was more discussion “off line” and our president and president-elect met to finalize what we currently have today. We plan to introduce the updated mission/vision to our membership during the March monthly program.

**What were the Outcomes?** The primary outcome is an updated mission/vision and a set of board values. This process immediately engaged board members; we have an incredibly committed group of people leading this chapter, and we attribute it in many ways to the process that all we went through together to define who we are and how we will work together.

Another outcome is clarification for our membership about what the chapter exists to do and how the leadership will function. It gives members confidence and makes our chapter a desired place to learn and participate in our profession.

**Lessons Learned:** Updating the mission/vision/values brought our board closer together and allowed us to clarify what we exist to do, what we want to be, and how we will work together. We were able to simplify, yet get powerful meaning in who we are and how we will interact with each other. But the biggest win is it immediately engaged new board members and got them interacting with existing ones on a level playing field. This process eliminated the “you are the new person” culture that often exists when a board has several new members. Ideas from new members were given the same level of respect and thought that existing members had. It was also evident that if your goal was to sit back and put another tick mark on your resume, you might not be comfortable here. This is a high energy group and all behavioral styles are embraced.

**Please list the specific ASTD chapter resources that helped guide you in the process of completing this best practice:** We began with the ASTD mission and “about us” page as a starting point. We wanted to make sure we are aligned with ASTD.

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