**SOS Submission: ATD NYC  
 SOS Title: Chapter Goal Template & Dashboard**

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| **Submission Date: October 2, 2017** **Chapter Name: ATD NYC**  **Chapter ID: CH1026** **Chapter Location: New York City** **Chapter Membership Size: 343** | **Contact for this Submission: Mike D’Amico** **Email Address: mdamico14@gmail.com** **Phone Number: 516-443-7225**  **Chapter Title: VP of Operations** **Chapter Website URL: www.atdnyc.org** |

*When responding to each area, please provide information about who, what, when, how, why, where, and to what degree where appropriate. Also, please be specific and provide enough detail that would allow a leader from a different chapter to pick up this document and mimic your effort.*

**Description of Effort:**

The Chapter created a goal setting template to develop our annual goals, initiatives and activities. To support goal achievement we created a monthly dashboard report to track our results.

**Need(s) addressed (please be specific):**

Our need was to establish teamwork around specific goals we wanted to achieve during our board term. The goal template clarified our goals and responsibilities by functional area. It ensured that our goals aligned with our overarching need to drive membership and member engagement, contributing to the sustainability of the Chapter.

**What is your chapter’s mission?**

Our mission is to serve the New York metropolitan area business professionals with cutting-edge human performance improvement programs, resources, and events so they can deliver strategic value to their stakeholders; to expand their network of professional relationships; and to enhance their career opportunities.

**How does this effort align with your chapter mission (Please provide specific examples)?**

With our continuing theme of “Learn, Connect, Grow” these tools fostered discussions around how to strengthen and grow our Chapter. Outcomes of these discussions led to the delivery of several half-day and full-day programs, an increased number of large, joint networking events and an increase in membership and Chapter revenues. A stronger Chapter, from a membership and financial perspective, provides the opportunity to present relevant programs and achieve our mission.

**\*ATD Mission:** **Empower professionals to develop talent in the workplace.\***

**How does this effort align with ATD's mission (Please provide specific examples)?**

Part of the ATD mission is to support the talent development profession. We help achieve this mission through a stronger, more viable Chapter demonstrated through our programming and other offerings and positioning the Chapter as the primary organization for talent development resources. With 68 attendees at our kickoff meeting in January we launched our 2017 programs with round table discussions and report-outs on current topics and trends. Examples of programs we delivered this year include Building High Performance Teams, Integrating Learning & Performance, a half-day workshop on “Is Training the Right Fix”, and several joint events with other organizations including ICF, ODNNY, and NYC SHRM.

**Target Audience (Who will benefit/has benefited?):**

Both documents were used as directional tools for the Chapter Board. Indirectly, as the Chapter achieved its goals, members were positively impacted through more relevant programming and a financially stronger Chapter through increased membership.

**Costs/Resource 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.)*

These are low cost tools for the Chapter. The only cost is the volunteer time needed to develop the Chapter goals and create and maintain the dashboard on a monthly basis. The goal development took place during our January board retreat and first quarter board meetings. The required dashboard information is drawn from existing reports the Chapter creates each month.

**How did you implement?** *(Please give a brief description.)*

After the initial development, the tools were reviewed with the Chapter board and approved for use. The board embraced the tools as a way to maintain our focus on our goals and achieve results. Both documents are used to develop our monthly board meeting agenda and are reviewed at the start of each meeting.

**What were the Outcomes?** *(Please include hard data regarding financial, membership increases, target audience satisfaction levels, publicity for the chapter or for the profession, etc.)*

The Chapter experienced a significant increase so far this year in membership (+11%), corporate membership (+66%), member retention (+14%), power membership (+28% & the Chapter achieved its goal of 35% for the first time since 2013), and revenue (+11%). From a program perspective, discussion around these goals led to the creation and delivery of additional events in the area of coaching, generating both increased member engagement and revenue. We have also held four networking events this year with a total of 228 attendees, both members and non-members. The non-member attendees became prospects to grow our membership.

**Lessons Learned:** *(Hints and tips for other Chapters who may be considering a similar effort)*

Operating the Chapter like a business allowed us to develop teamwork, stay focused on our goals and achieve our results. These tools allowed for that process to happen by providing focus, accountability and insight as to our successes and when course corrections needed to be made.

**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):**

Initially, the documents were created by the VP of Operations and reviewed with the President and Past-President for their input. The entire board refined the documents during the first quarter, 2017.

**How did you become familiar with the Sharing Our Success (SOS) program?**

* Saw or heard of SOS from Twitter
* Saw or heard of SOS from Facebook
* Saw or heard of SOS from another Chapter Leader
* Saw or heard of SOS from LinkedIn Chapter Leaders group
* Saw or heard of SOS on an area call with a NAC representative
* Found SOS on ATD website
* Other

**Would you be willing to present on this submission at the ATD Chapter Leaders Conference (ALC)?**

Yes.

**\*Participating chapters receive up to two complimentary registrations for presenters.**

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