

## Sharing Our Success (SOS) Submission Form

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**Chapter Name:** Los Angeles

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**Chapter Membership Size:** Medium (101-299)

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**Chapter Contact Person:** Kavita Gupta

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**Email Address:** president@atdla.org

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**Phone Number:**

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**Chapter Board Position:** President

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**Chapter Website URL:** www.atdla.org

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**Submission Title:** A Successful Bi-Annual Strategic Planning Process

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**What did you do? (a 2-3 sentence summary of your effort):** Use a two-pronged bi-annual strategic planning process instead of an annual strategic planning process for success.

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**Who benefitted from this effort (Target Audience) Check all that apply:**

- Chapter Members
- Board Members
- Chapter Volunteers
- Potential Chapter Members
- Non-Chapter Members

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**Why did you do it? What chapter needs were addressed?** The chapter did not have a well thought annual strategic plan for chapter programming, event planning, social media, marketing or volunteer recruitment. By creating two strategic planning meetings in fall and winter, chapter leadership was able to create Action Plans for each area that contained objectives each director and the president would strive to accomplish during the year. The fall meeting in September was used to create Action Plans for the following year and the winter meeting in January was used to refine each director's Action Plans and execute them.

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**What were the measurable outcomes? (May include data regarding financial gains, membership increases, target audience satisfaction levels, publicity for the chapter or for the profession, etc.)**

One month prior to each meeting, an email is sent to board members outlining what should be included in an Action Plan (with examples) and a deadline given for submitting reports. All the information along with a detailed agenda, meal plan and other logistics for the meeting are prepared by the president with the help of the chapter administrator. These meetings are held at a venue or the president's home to make it more personal. All the meeting materials are compiled into a Leadership Strategic Planning document and copies made for each board director (submitted).

In 2019 under my leadership as president elect, participation in chapter meetings doubled from 30-60 participants by 50%, participation in Orientations increased 100%, and membership increased by 10%. Although membership declined in 2020 as a result of the pandemic, membership increased by 2% in 2021.

In 2020, under my leadership as president, the chapter cut costs on credit card fees by 50%, Constant Contact fees by 50% and online meeting platform costs by 65% adding almost \$3,000 to the chapter's bottom line. Volunteer board and chapter leader recruitment also tripled from 2019-2021 and the bi-annual meetings allowed incoming board members to start transitioning in the fall so that they were ready on Jan 1 for their new roles, while allowing current and ongoing board members to jump start the planning process for the new year ahead of time.

The bi-annual 3 hour meetings hosted by the chapter president are attended by 100% of the board, incoming chapter leaders, volunteers and office administrators and everyone loves the complimentary meal and gifts that chapter leaders receive in recognition for their leadership and volunteer work. In addition, the in-person meetings help build camaraderie and provide an opportunity for board members to meet each other as all other chapter board meetings are held virtually in Los Angeles due to distance challenges associated with living in a large city.

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**What steps did you take to implement this effort? (Remember that other chapter leaders will use this to replicate the effort. Be specific)**

1. Start the process to put together the strategic planning document in June/July.
  2. Use the template that has been created and replicate it for ease (see submission).
  3. For chapters that follow the Jan 1 - Dec 31 term, hold elections by August so that a board and chapter leaders are in place by the September strategic planning meeting and invite incoming and new leaders to this meeting. Every new board member has found this meeting to be very helpful in understanding the big picture of how a chapter operates, the role and responsibilities associated with the various board members and how a chapter fits into ATD Global.
  4. Use the January strategic planning meeting to refine goals and objectives and board member initiatives so that a plan for the year is in place by January and the chapter can execute its plan with ease.
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**Is there anything you would do differently?** Following up with chapter leaders to submit their Action Plans on time can be a challenge so it is helpful to designate this task to the Secretary of a chapter and assign a due date. It also helps to send two reminders prior to the due date so that Action Plans are submitted on time.

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**When did you start working on this effort?** Jan 01, 2019

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**When did this effort go live?** Jan 12, 2019

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**Approximately how many hours were spent working on this? Include an estimate of hours spent across all board members and volunteers.** 20

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**What resources did you use? Check all that apply:** Board Members

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**Which board positions were involved in the effort?** I created the idea of the bi-annual strategic planning meeting and put together the strategic planning document myself. Board members and other chapter leaders such as the social media manager and mentor program administrators contribute to the strategic planning effort by submitting their action plans.

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**Do you have any additional insights to share with other chapters implementing this effort?** This submission empowers chapter leadership to develop as leaders by putting on their strategic thinking hats, envisioning goals and objectives for the chapter and its members and putting these into action. Many chapter leaders are consultants or mid-level managers new to the L&D field and have never developed or had the opportunity to participate in a strategic planning process. This submission helps chapter leaders develop several facets of their leadership potential as laid out in the Talent Development Capability Model: Building Personal Capability, Impacting Organizational Capability and Developing Professional Capability.

Starting the planning for the following year in the fall helps to have programming, a board, volunteers and many pieces almost 90% in place so that prospective and current members are reassured that their dollars are being invested wisely. By seeing a full slate of programs ready to go for the spring of the upcoming year inspires them to attend meetings, join the chapter and get involved. Starting the planning process in January with a new board delays programming, social media, marketing and many other efforts and puts the chapter at a disadvantage with both prospective and new members.

Note: The Fall 9/18/2021 and Winter 1/15/2022 Strategic Planning & Operating Plan are being sent to sos@td.org as the files are too big to attach.

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**Please attach any documents that help support this submission. It is highly encouraged to submit editable files (ex. Word, Excel, etc): (additional documents and documents over 2MB should be sent to [sos@td.org](mailto:sos@td.org))**

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<https://www.formstack.com/admin/download/file/12105715449>

**How did you become familiar with the Sharing Our Success (SOS) program? Select all that apply:**

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Other: td.org, previous involvement with ASTD

**Would you be willing to apply to present on this submission at the ATD Chapter Leaders Conference (ALC)? \*Request for Proposals (RFPs) open in May of each year at [td.org/alc](http://td.org/alc). Selected session facilitators receive complimentary registration.**

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No

**email\_consent**

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