



## **Chapter Annual Report**

### **Eastern Pennsylvania ASTD Chapter**

**Date:** December 2007

As president of the Eastern Pennsylvania ASTD Chapter I would like to inform you of the progress our chapter has made during the past year toward achieving stated chapter strategic goals and providing programs, events and services needed by our members. I would also like to report on the chapter's current financial and membership status.

#### **1. Chapter Strategic Goal: Build Credibility**

- Increase membership by double in 5 years (2006- 2011)
- Recognized as a leader in the ASTD/Workplace Learning and Performance (WLP)community

#### **Description of progress in achieving the goal:**

In 2007 the chapter added 58 new members and 99 members renewed their membership for a total of 151 members. We did experience 28 members that did not renew their membership. A detailed report is below.

We are meeting our yearly goal in this area but we need to work on discovering why members do not renew their membership.

We are recognized by national ASTD as a leader in the WLP community for:

- Our innovative CEO forum to increase C-Level interest in WLP.
- Chapter of the Month for June 2007.
- Submission of several SOS (Sharing our Successes) which are "best practices" of our chapter that are shared with all national chapters.
- Having five board officers that serve on ASTD national committees.
- Having one board member who earned the CPLP certification

This puts our chapter at the forefront in the strategic direction of our profession.

## **2. Chapter Strategic Goal: Proactively Partner**

- Increase visibility to be valued business partner in our region

### **Description of progress in achieving the goal:**

We are doing an acceptable job in this area as some of our board officers are involved in Eastern PA events and other boards.

We worked with a Penn State PhD candidate to assist in her research project *Working Longer* to survey both employers and employees.

We need to increase our efforts in this goal as there are more opportunities that we have not explored.

We also need to get involved with a community service activity to increase our visibility.

## **3. Chapter Strategic Goal: Enhance Membership**

- Increase participation
- Increase retention

### **Description of progress in achieving the goal:**

As reported earlier we are increasing membership but not managing our retention well. This is an area we must work on in the next year.

We will be required by ASTD national to develop and implement a retention plan in 2008.

Attendance has increased at our programs and we hope that new program and event offerings will assist in this endeavor.

We did not offer a professional development conference this year due to planning short falls. This conference is normally well attended and results in the chapter increasing revenue.

A SIG survey was conducted this year to see the interest for special groups. The information gained from this survey will be used to create new SIGs in 2008.

A membership survey will be conducted in 2008 to seek input from our memberships and this survey will be conducted annually per a requirement from ASTD national.

## **4. Chapter Strategic Goal: Nourish the Culture**

- Leverage expertise of our member

### **Description of progress in achieving the goal:**

We have recruited three new board officers this year and a new director of best practices for internals. This new talent has positively impacted the chapter and has positively positioned us for future growth.

We also have several members serving on a steering committee planning the 2008 CEO Forum.

We have a new marketing strategy that will assist us in our growth. We conducted a successful phone-a-thon calling national members that were not chapter members and obtained nine new members as a result of our efforts. We had a free networking event at which our current members got to speak to potential members.

This is an endeavor that will need continuous attention.

We also documented all chapter board policies and procedures through a Knowledge Management Initiative (KMI). This initiative must continue as new policies and procedures are developed.

### **5. Chapter Strategic Goal: Enhance Careers**

- Integrate the CPLP into everything we do functionally
- Enhance careers of membership

### **Description of progress in achieving the goal:**

We began 2007 with a new director of certification position with hopes of creating programs, networking, and study groups to assist chapter members pursuing the CPLP certification.

Unfortunately we received very little interest in this endeavor. Until the profession and employers make the CPLP an important part of career development and employment our endeavor is not going to be very successful.

We are not abandoning this but placing it on hold. Also the director of certification has resigned.

We did not offer an annual conference this year and that had a negative impact on enhancing members' career development.

We did offer four quarterly programs on a variety of career needs and the programs were received positively by members.

We need to tie our programming and events to the core competencies of the CPLP.

## **6. Chapter Strategic Goal: Maintain Financial Health**

- Ensure financial health of the chapter

### **Description of progress in achieving the goal:**

While we did not make a significant profit this year our chapter is financially sound. A detailed financial report is below.

The fact that we did not offer the annual conference contributed to this shortfall. Also we conducted the CEO forum at a financial loss this year.

We need to reassess our program pricing and yield for each program and event we offer to ensure that we are making a reasonable profit.

We also need to emphasize the use of our chapter code (CH2073) to members when they purchase products or service from national; as the chapter receives a percentage of the profit.

We also added a chapter store where member can purchase chapter logo items.

## **7. Chapter Strategic Goal: Leverage Technology**

- Leverage technology to automate all processes

### **Description of progress in achieving the goal:**

We have excelled in this area.

We moved our website to the ASTD national web portal system and thus saving the chapter \$3,500/year for website hosting. While there currently is 'no fee' from national for the portal, there will be an expense in the coming years but we know the fee will not be significant.

We also leveraged the use of Yahoo's group and list serves to better communicate with the membership.

We also implemented an electronic event registration which saves time and allows for the payment of the event or program.

All chapter board minutes, newsletters, board job descriptions, forms and other related documents are posted on the website so that all members have access to them.

We will be planning to leverage the website and other technology in the years to come.

## 8. Financial Report:

\$13,563	Balance Jan 1
\$11,450	Income *
\$(13,390)	Expenses **
\$11,623	Balance Nov 30

- \*\$464 income from chapter incentive program (CHIP)
- \*\*\$3,500 was spent on the final installment payment for our old website. This expense will not be recurring in 2008.

## 9. Membership Report:

Opening Yr: 121 members  
Ending Yr: 151 members (Nov 30th)  
# Of new members: 58  
# Of renewals: 99  
# Of non renewals: 28  
98 both memberships = 64% (exceeds national ASTD criteria)

Respectfully submitted,

*Don Dutko*

2007 President  
Eastern Pennsylvania ASTD Chapter  
(610) 366-0885 Phone  
(610) 533-5023 Cell  
astdepa.president@gmail.com

[www.easternpa.astd.org](http://www.easternpa.astd.org)