



Assistant Learning Officer

Basic Certification Digital Workbook

Assistant Learning Officer

Basic Certification

Welcome to your Basic Certification for the assistant learning officer (ALO) role!

As part of this Basic Certification, you will review eight videos that introduce you to the ALO role and the seven steps you will complete to create a successful learning year for your chapter. As you watch these videos, use this workbook to write down notes and think through questions and reflection points for each step in the planning process.

In the videos, we will provide foundational information for all of the steps in the ALO process. However, we are only providing suggested action items for steps 1 through 3. These action items go hand-in-hand with the suggested best practice tips in the corresponding job aids. We recommend completing the action items in this workbook before attending the ALO Workshop.

After completing these initial steps, if you would like to get a head start in planning your learning year, feel free to review the job aids for more information about the remaining steps in the planning process.

When you attend the upcoming ALO Workshop, you can expect to:

- Build on the foundational information learned in Basic Certification.
- Explore steps 4 through 7 of the planning process in greater detail.
- Answer outstanding questions and discuss common challenges and solutions.
- Work with your fellow ALOs to start building your learning program and test your ideas.



Introduction to the Role

The ALO Journey

Year 1

Role: Assistant Learning Officer

Responsibility: Planning

Year 2

Role: Learning Officer

Responsibility: Execution



3 ALO Goals

1. Assess

My ideas/questions/notes:

2. Design

My ideas/questions/notes:

3. Measure

My ideas/questions/notes:

7 Key Steps for Planning Your Learning Year



Research
Past Programs



Profile
Audience



Determine
Budget



Design
Program



Onboard
Day Chairs



Plan
Logistics



Design
Program Launch





Question

What questions do I have for my peers in the ALO role?



Reflections

What does a successful learning year look like to me?

At the end of my learning year, what do I want members to say about their experience?

At the end of my learning year, what impact do I want to have on my charter?



Action

Print the job aid for this step and follow the tips and best practices.



Step 1 - Research Past Programs



Question

What questions do I have for my chapter's previous ALOs?



Reflections

What are some key takeaways from the programs that I have participated in?



Action

- Print the job aid for this step and follow the tips and best practices.
- Identify 3 members and/or previous chapter ALOs to talk to about past programs:

1. _____
2. _____
3. _____

- When you meet with your chapter administrator and previous chapter ALOs to discuss past programs, touch on the following topics:

One thing that worked well:

Potential learning opportunities:

Gaps:





Action (continued)

- Who is your regional network ambassador?
- Who is your network director?
- Review the Directory of Best Global Events/Best of the Best awards.
What are your top 3 takeaways?

1. _____

2. _____

3. _____



Notes & Questions

My ideas/questions/notes:



Step 2 - Profile Audience



Question

What questions do I want to ask the members in my chapter in order to design my program?



Reflections

What are my learning preferences?

What is unique about the members in my chapter?



Action

Print the job aid for this step and follow the tips and best practices.

Identify 3 members to interview:

1. _____

2. _____

3. _____

How will your chapter's health, lifecycle stage, and demographics impact your learning year?





Action (continued)

- Review the members' responses from the Learning Preferences Survey.

List the top 3 take aways:

1. _____
2. _____
3. _____

- What is unique about the members in your chapter?

- How does this impact your program design?

- After completing your Assessment Worksheet, write down your primary goals and passions.

Goals:

Passions:

My ideas/questions/notes:



Notes & Questions



Step 3 - Determine Budget



Question

What budgetary questions do I have for my chapter administrator?



Reflections

What do I want to spend the majority of my budget on?

What items are non-negotiable for me?



Action

- Print the job aid for this step and follow the tips and best practices.
- Work with your finance officer to determine your budget. My budget is:

- Identify 5 members you can solicit connections from:

1. _____
2. _____
3. _____
4. _____
5. _____

- Identify 3 potential sponsors:

1. _____
2. _____
3. _____

How could you return the favor?



My ideas/questions/notes:



Notes & Questions



Step 4 - Design Program



Question

What questions do I need to ask my learning advisory team?



Reflections

What am I passionate about?

Personally:

Professionally:

Related to YPO:

In your review so far, what learning themes have emerged that you feel are relevant to your chapter's members?



Action

Print the job aid for this step and review the tips, best practices, and resources.

What dates should you avoid while you are planning your learning year?

Personally:

Professionally:

Related to YPO:



Notes & Questions

My ideas/questions/notes:





Step 5 - Onboard Day Chairs



Question

What questions do I need to ask my potential day chairs?



Reflections

When considering day chairs, what qualities are most important to me?



Action

- Print the job aid for this step and review the tips, best practices, and resources.



Notes & Questions

My ideas/questions/notes:



Step 6 - Plan Logistics



Question

What elements of my program need a “Plan B”?



Reflections

What can I do to ensure that my program goes smoothly?



Action

- Print the job aid for this step and review the tips, best practices, and resources.



Notes & Questions

My ideas/questions/notes:



Step 7 - Design Program Launch



Question

What methods should I use to market my program? (consider time, budget, audience)



Reflections

What makes me excited about an upcoming event?



Action

- Print the job aid for this step and review the tips, best practices, and resources.



Notes & Questions

My ideas/questions/notes: