

Sharing Our Success (SOS) Submission Form

Chapter Name:	San Diego
Chapter Membership Size:	Medium (100-249)
Chapter Contact Person:	Kim Denton
Email Address:	mentorship@tdsandiego.org
Phone Number:	
Chapter Board Position:	Director of Mentorship
Chapter Website URL:	https://www.tdsandiego.org
Submission Title:	From Handbook to Cohort: Building a Structured, Research-Based Mentorship Program
What did you do? (a 2-3 sentence summary of your effort):	ATD San Diego transformed its mentorship offering from a handbook-only program into a fully designed, five-month cohort experience. We built a complete program infrastructure - a recruitment website, a multi-channel marketing campaign, revised mentor/mentee applications, a research-validated matching rubric, five facilitated cohort gatherings with guest speakers, and an end-of-program evaluation - and ran it March through July 2026 for 10 mentor-mentee pairs, coming in 45% under our \$600 budget target.
Who benefitted from this effort (Target Audience) Check all that apply:	☐ Chapter Members ☐ Chapter Volunteers ☐ Potential Chapter Members

Why did you do it? What chapter needs were addressed?

Our chapter's mentorship program had historically been one of our most valued member benefits, but it existed only as a participant handbook - there was no documented program design, no recruitment strategy, no structured matching process, and no measurement of outcomes. The Director of Mentorship was also a brand-new board role with no defined scope, so the chapter needed to (1) professionalize a flagship member program so it could be replicated year over year regardless of who holds the role, (2) create a compelling reason for talent development professionals to join and stay engaged with the chapter, and (3) build deeper community among members. Members consistently tell us they join ATD San Diego for connection and career growth; a structured mentorship program directly delivers both, and it gives prospective members a tangible benefit we can point to in recruitment.

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.)

RECRUITMENT: 28 applications received (17 mentees, 11 mentors) through a four-week, multi-channel campaign - exceeding our goal of 10 matched pairs.

MATCHING: 10 mentor-mentee pairs matched using a research-validated weighted rubric (goals alignment 40%, deep-level similarity 30%, industry/role context 20%, mentor capacity 10%), with all matches reviewed and approved by the Board of Directors.

SATISFACTION (end-of-program survey; 16 of 20 participants responded, an 80% response rate):

- Overall satisfaction: 4.75 / 5.0 average; 100% of respondents rated 4 or 5
- 'My pairing was a good match for my goals and needs': 4.62 avg; 100% rated 4-5
- 'I felt supported by program leadership': 4.94 avg; 100% rated 4-5
- 'I would recommend the program to a colleague': 4.75 avg; 100% rated 4-5
- 14 of 16 respondents (88%) said they would 'definitely' participate again or recommend the program

IMPACT: 100% of mentee respondents agreed they gained career-relevant skills, made progress toward a specific professional goal, felt more confident in their role, and received actionable guidance they applied at work (4.86 avg across all four measures). 94% of all respondents made a meaningful professional connection.

ENGAGEMENT: 88% of respondents reported 5 or more mentor-mentee meetings during the program (cohort gatherings plus one-on-ones).

FINANCIAL: Total spend of approximately \$333 against a \$600 target budget (\$700 authorized) - 45% under target, achieved by using a donated venue (San Diego Humane Society) and volunteer guest speakers.

PUBLICITY: A dedicated recruitment website, a four-week LinkedIn campaign on the chapter page, homepage banner placement, and QR-code promotion at all chapter learning and social events during the application window.

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

PHASE 1 - PLANNING & DESIGN (Dec 2025-Jan 2026). Scoped the new Director of Mentorship role and got leadership team sign-off; recruited a Deputy Director; reviewed 2025 program feedback (five surveys) and identified improvements; finalized program structure, timeline, and budget; secured a free venue (San Diego Humane Society) for all four in-person gatherings; built the full program design package - program summary, roadmap/timeline, goal-setting guide, planning and conversation guides, progress tracker, and meeting agendas; updated the existing handbook for accessibility and readability; and designed and published a recruitment website (built with Gamma at no cost).

PHASE 2 - RECRUITMENT & APPLICATION (Feb-early Mar 2026). Ran a four-week LinkedIn campaign on the chapter page (promo video, mentee and mentor testimonials, weekly graphics), placed a banner on the chapter website homepage, added all five program events to the Wild Apricot event calendar, and promoted applications via QR codes at chapter learning and social events. Applications ran Feb 1-Mar 7 with a planned one-week deadline extension announced in week 4 to drive final urgency. Revised the mentor and mentee application questions (Google Forms) to capture goals, expertise areas, career stage, industry preferences, communication style, and a commitment confirmation for all event dates.

PHASE 3 - MATCHING & ONBOARDING (Mar 2026). Reviewed all 28 applications and scored prospective pairs against a weighted, research-based matching rubric (developmental needs/goals alignment 40%; deep-level similarity in values, style, and approach 30%; industry/role/organizational context 20%; mentor capacity and career-stage fit 10%). The Board of Directors reviewed and approved all final matches. Participants were notified by personalized emails, and separate WhatsApp groups were created for mentors and mentees. Held a virtual pre-kickoff training/orientation on March 19 where pairs met and set initial goals.

PHASE 4 - PROGRAM EXECUTION (Apr-Jul 2026). Hosted four in-person cohort gatherings at the San Diego Humane Society (Apr 1, May 7, Jun 4, Jul 2), each opening with a 30-minute facilitated activity led by a volunteer guest speaker - topics included communication styles (with a four-quadrant assessment), connection and reflection through play, and leveraging strengths. Pairs met at least monthly between gatherings. The program committee managed refreshments, expense reports, and venue coordination for each event.

PHASE 5 - GRADUATION & EVALUATION (Jul-Aug 2026). The July 2 gathering doubled as a graduation event with certificates

(certificate holders and cardstock purchased for about \$21) and a 'Paying It Forward' panel of past participants. Sent a final feedback survey to all participants, conducted post-program analysis, documented lessons learned, and prepared handoff materials for the 2027 director - including priority-placement notes for one unmatched mentee and one mentee who gave up his seat.

Is there anything you would do differently?

Three things. First, build more structured cross-pair connection into the cohort gatherings - the most common survey request was more time and structure for participants to get to know the other mentors and mentees (full-group introductions in session one, icebreaker prompts, small-group wins/challenges shares), since our content-packed agendas left little room for organic networking. Second, choose guest-speaker activities that require no pre-work or prior assessments (our strengths session landed flat for participants who had never taken the assessment). Third, consider a more centrally located venue - the donated space was excellent for the budget, but travel distance was the top friction point for participants outside central San Diego.

When did you start working on this effort?

Dec 01, 2025

When did this effort go live?

Feb 01, 2026

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

250

What resources did you use? Check all that apply:

Chapter funds
Sponsorships/Partnerships
Volunteers
Board Members

How much money was spent?

\$332.67 (of a \$600 target / \$700 authorized budget) - refreshments for four in-person events, name-tag labels, certificate holders and cardstock for graduation, and event decorations/supplies.

Was this an in-kind or monetary sponsorship? If monetary, how much was provided? Who were your partners/sponsors? How did you solicit sponsors?

In-kind. The San Diego Humane Society provided the meeting venue for all four in-person cohort gatherings at no cost. The relationship was already in place at the chapter level - no solicitation was required. All guest speakers volunteered their time and were not paid.

How many volunteers were you able to recruit?

6 - one Deputy Director of Mentorship (a dedicated volunteer who supported design, matching, and events) and five volunteer guest speakers/facilitators who led the kick-off activity at each cohort gathering.

Which board positions were involved in the effort?

Director of Mentorship (program owner), Chapter President (venue agreement and match approval), Director of Technology (Wild Apricot event calendar and homepage banner), Director of Digital Experience (LinkedIn campaign graphics), and the full Board of Directors (reviewed and approved final mentor-mentee matches).

Do you have any additional insights to share with other chapters implementing this effort?

Three things made this work on a small budget. (1) A free, reliable venue is the single biggest budget lever - partner with a local nonprofit that has meeting space; ours saved us roughly the entire refreshment budget. (2) A weighted matching rubric beats gut feel - scoring pairs against published criteria (goals alignment, style/values fit, industry context, mentor capacity) gave us defensible matches the board could approve in one meeting, and our survey validated it: 100% of respondents agreed their pairing was a good match. (3) Design for the handoff from day one - because this was a new board role, every artifact (role scope, SOPs, roadmap, application questions, rubric, notification email templates, expense report process) was documented so the 2027 director can replicate the program without starting over. We also kept a running 'note to the next director' file with priority-placement participants and process improvements, which proved invaluable at closeout.

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)

<https://www.formstack.com/admin/download/file/19998999259>

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

Chapter Leader

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

Yes