

SOS Submission: SOS Title: Operations Manual

Submission Date: 11/12/18
Chapter Name: Nebraska
Chapter ID: CHIP 6064
Chapter Location: Lincoln, Nebraska
Chapter Membership Size: Medium

Contact for this Submission: Jennifer Labrie
Pereira/Krishna Clay
Email Address: Jennifer.labriepereira@hyatt.com
Phone Number: 402-952-1148
Chapter Title: VP Finance
Chapter Website URL: www.atdnebraska.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 an operations manual to ensure that anything in addition the bylaws and job descriptions were documented for consistency among the chapter.

Need(s) addressed (please be specific):

As part of a risk assessment it was determined the chapter needed some policies and other operational items documented to ensure consistency.

What is your chapter's mission?

Our mission is to enhance members' abilities, to develop talent and support clients and organizations in our local and global communities.

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

By providing consistent procedures, policies and other chapter documents it enhances the board members experience and helps them to consistently align to the chapter's processes and priorities which in turn benefit the chapter and its members.

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

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

It empowers their chapter leaders to easily access information about the chapter to ensure the chapter is running efficiently and

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

Board Members/Chapter Leaders

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.)*

Time of the board members to gather the information and creation of the manual. The initial creation was more time consuming, then it should just be as updates are made or an annual review. No financial costs. They put the manual in their online repository for access. Their admin helps makes updates as needed.

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

The initial creation of the manual was a board effort to ensure items that would not already be in the bylaws or job descriptions. This allows better onboarding from year to year, consistency as well as a reference for all of the things that impact their chapter operations. It helps historically with changes as well. Changes to the manual have to be approved by the board via vote.

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.)*

Increased satisfaction of board members, consistency among processes and onboarding, an easy place to reference chapter operational items.

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

Ensure that your board or designate reviews the manual periodically to ensure it is kept up to date. Annually is ideal. Also, make sure as processes change throughout the year that the manual is updated then as well.

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.):

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)?

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

Please email completed forms to sos@td.org along with any supporting documents.