

## Sharing Our Success (SOS) Submission Form

<b>Chapter Name:</b>	Florida Suncoast
<b>Chapter Membership Size:</b>	Medium (101-299)
<b>Chapter Contact Person:</b>	Jenn Buckley
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<b>Phone Number:</b>	
<b>Chapter Board Position:</b>	Consultancy SIG Manager
<b>Chapter Website URL:</b>	www.atdsuncoast.org
<b>Submission Title:</b>	Chapter Financial Review Guide & Checklist
<b>What did you do? (a 2-3 sentence summary of your effort):</b>	In response to several chapters asking for assistance in providing a "financial review" (which is a CARE requirement), we created a Guide on how to do so with an accompanying checklist.
<b>Who benefitted from this effort (Target Audience) Check all that apply:</b>	<input type="checkbox"/> Chapter Members <input type="checkbox"/> Board Members <input type="checkbox"/> Chapter Volunteers <input type="checkbox"/> Chapter Sponsors <input type="checkbox"/> Chapter Partners <input type="checkbox"/> Potential Chapter Members <input type="checkbox"/> Non-Chapter Members <input type="checkbox"/> Consultants <input type="checkbox"/> Other
<b>Why did you do it? What chapter needs were addressed?</b>	As a part of CARE, chapters should be reviewing their finances every year. However, it's everyone's least favorite task and part of that is because there aren't many resources available on "how" to do this. We kept hearing "Oh, yeah, I'd be willing to help but I don't know how to do this." So, we created a simple resource! This guide and checklist provide a template that anyone can follow to complete a financial review for either their chapter or another chapter.

**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.)**

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

We are now able to complete a financial review with minimal fuss and anyone who agrees to do this now has a guide to follow and a checklist to provide a standardized report as a completed report.

These materials were used for a review of two different chapters (as test cases). The best way to implement this is to follow these steps:

- 1) Ask the chapter board to appoint someone to perform the financial review (it can be a chapter member, another chapter's board member/member, or even someone with basic bookkeeping experience)
- 2) Provide the guide and checklist to the Reviewer
- 3) Have the chapter board and Reviewer go over what should be covered (not all items in the guide will always be covered - items that are not applicable can be crossed out)
- 4) The Reviewer will complete the review and submit findings to the chapter board.

**Is there anything you would do differently?**

While these materials have been used a few times, we would appreciate any feedback to make them more complete and useful.

**When did you start working on this effort?**

Feb 01, 2025

**When did this effort go live?**

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

Jun 12, 2025

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

Other: None.

**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))**

<https://www.formstack.com/admin/download/file/18876862376>

**additional supporting documents:** <https://www.formstack.com/admin/download/file/18876862403>

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

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**Would you be willing to apply to Yes 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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**email\_consent** true

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