

Sharing Our Success (SOS) Submission Form

Chapter Name:	South Florida
Chapter Membership Size:	Medium (101-299)
Chapter Contact Person:	Barbara Potter
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Phone Number:	
Chapter Board Position:	President
Chapter Website URL:	https://atdsfl.org/
Submission Title:	BOD Collaborative Agenda
What did you do? (a 2-3 sentence summary of your effort):	As President, I changed the way we reported out in our monthly Board Meetings. Historically, each VP created a set of slides and reported out on metrics for their role. While this was great for status, it did not foster collaboration. So instead, I rebuilt the agenda template as a collaborative shared document and asked each VP to contribute to the agenda each month.
Who benefitted from this effort (Target Audience) Check all that apply:	Board Members
Why did you do it? What chapter needs were addressed?	<p>As President, my chapter vision is to Empower, Spotlight, and Include. A collaborative agenda supports this vision:</p> <ul style="list-style-type: none">• Empower: VPs are better able to collaborate with each other, make decisions for their team, and knock down silos.• Include: Directors are included in what's happening so that we can communicate to our teams, and everyone is informed of chapter business.• Spotlight: We are building the muscle of sharing our wins, first to the BOD, then to the chapter through team communications and chapter announcements, and then to the community via social media. <p>I wanted the VPs to feel more invested in the meeting and the chapter's direction. I asked each VP to report out on updates, support needed, and wins. I also asked each VP to encourage their directors to attend at least one board meeting. Finally, I stacked the top of the agenda with votes needed so that we handled urgent items first.</p>

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.)

- By enabling contributions to the agenda beforehand, we can identify and resolve straightforward issues asynchronously. This leaves more time during the actual meeting for complex discussions and strategic decisions.
- This approach produces dynamic discussions that are a result of board members being better prepared for those discussions. VPs know what to expect from the entire board, in addition to their section.
- We can easily track changes, add notes, and assign action items directly on the agenda. This ensures nothing gets overlooked, and everyone stays on the same page.
- A shared agenda shows transparency in decision-making processes, which builds trust among board members.
- A shared agenda ensures everyone's voice is heard and reduces any sense of hierarchy or exclusivity.
- We often end board meetings early, with a sense of accomplishment about our wins.

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

I researched ideas for running more effective board meetings, and I created:

- Email template to communicate the agenda process each month, along with the calendar invite
- Shared Agenda template

Is there anything you would do differently?

Not really. I asked for and received feedback that the board is very happy with the agenda, collaboration, and the process.

When did you start working on this effort?

Jul 20, 2024

When did this effort go live?

Aug 06, 2024

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

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What resources did you use? Check all that apply:

Board Members

Which board positions were involved in the effort?

President

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

There was some skepticism about a new process, along with resistance to letting go of creating and sharing slides. After the first meeting, no one worried about it. And when someone wants to share slides, they still can!

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)

additional supporting documents:	https://www.formstack.com/admin/download/file/17223591358
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How did you become familiar with the Sharing Our Success (SOS) program? Select all that apply:	ATD Chapter Leaders Conference (ALC)
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Would you be willing to apply to 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. Selected session facilitators receive complimentary registration.

email_consent	true
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