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| **Chapter Name** | Chicagoland Chapter Association for Talent Development |
| **Chapter Number (ex. CH0000)** | CH50009 |
| **Chapter Location (City, State)** | Chicago, IL |
| **Chapter Membership Size** | Large (300+) |
| **Contact Person for this Submission:** | Deanna Claerhout |
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| **Phone Number:** | (630) - 880 - 2367 |
| **Chapter Board Position:** | Manager of Events/Incoming VP Programming |
| **Chapter Website URL:** | [https://atdchi.org/](http://enotification.td.org/track/click/30530608/atdchi.org?p=eyJzIjoiakRRLWVsR0kwc0YyMVV3UVd3M1AwNnlseHBvIiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwczpcXFwvXFxcL2F0ZGNoaS5vcmdcXFwvXCIsXCJpZFwiOlwiYjgzNGVhMTdjZmI0NDU1NTk1MTIwMTk4ZDljMDVjMGJcIixcInVybF9pZHNcIjpbXCJmMzk3M2U1MmJhNmNlMDE5Y2NjMzljNTQ2OGYyM2Q2NjNhMWM3NDg1XCJdfSJ9) |
| **Submission Title:** | Wild Apricot Process Documentation for Programming |
| **Submission Description:** | We have defined a process and approach to using Wild Apricot for our event programming. These processes are meticulously documented in a user guide, providing step-by-step instructions with screenshots, to walk a board member through the procedures of setting up our events in Wild Apricot. We have a few different event types (for example: evening programs, all-day events, conferences, PDNs, and others) each one requiring a slightly different set up in Wild Apricot. Keeping all of the details straight was a challenge prior to implementation of the guide. As a result of our detailed documentation, we have streamlined our use of Wild Apricot for programming and have created operational efficiencies. |
| **Need(s) Addressed? Please be specific.** | To identify and document a consistent process and approach to using Wild Apricot for programming. |
| **What is your chapter's mission?** | ATDChi provides its members with the knowledge, skills, tools and resources necessary to ensure ongoing professional development, and the ability to deliver exceptional value to their organizations in the area of workplace learning and performance. |
| **How does this effort align with your chapter's mission (Please provide specific examples)?** | Wild Apricot is our chapter’s primary communication channel. It’s used to continually let our members know about upcoming events. The processes outlined in the User Guide ensure that we are leveraging the tool consistently from event to event. |
| **National ATD's mission is to "empower professionals to develop talent in the workplace". How does this submission align with ATD's mission? Please provide specific examples.** | Same as above. |
| **Target Audience: (Who will benefit/has benefited from this effort?)** | Board members are the primary target audience, as they leverage the documentation directly. However, members and potential members are also impacted because our consistent approach to employing Wild Apricot provides them with stable communication and registration for our events. |
| **Costs/Resources 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)** | The initial effort that our Manager of Events used to create the robust process documentation was roughly 10-15 hours. Because the user guide was created in Microsoft Word and uses free screen capturing tools, no monetary resources have been expended. |
| **How did you implement: (please give a brief description)** | The Manager of Events began by simply documenting the Wild Apricot event creation processes. Then, after the intimal steps were written, she formatted it and added screenshots to make it user-friendly. It’s a living document, as new processes are being added as needed. The guide is posted in our internal communication tool (Basecamp) for other members of the programming team to leverage. Our other teams are also going to leverage the user guide as a template to capture their own processes. |
| **What were the Outcomes: (Please include hard data regarding financial gains, membership increases, target audience satisfaction levels, publicity for the chapter or for the profession, etc.)** | As a result of the Wild Apricot User Guide for Programming, we’ve created operational efficiency and saved several hours in the Wild Apricot programming activities for our events. This documentation is expected to have future benefits as well, with incoming board members being able to leverage the documentation.   The documentation has also led to the creation of an Event Intake Form. This form makes it easy to prepare all of the details needed before adding the event in Wild Apricot. It includes the following elements: Event Title, Tags, Description, Location Address, Date, Time, Registration Limit, Pricing (by type), Announcement and Reminder schedule. |
| **Lessons Learned: (hints and tips for other chapters who may be considering a similar effort)** | It’s a best practice to document your processes as they are being defined, even if it’s a basic “straw-man” procedural processes. Having basics steps documented will make it easier to add formatting and screenshots later on. |
| **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.):** | The Chapter President and Manager of Technical Assets helped to define the processes, which led to the creation of the Wild Apricot User Guide for Programming. |
| **additional supporting documents:** | [ATDChi\_Event Intake Form.pdf](http://enotification.td.org/track/click/30530608/forms.td.org?p=eyJzIjoiUWNwWE9jMFZtbk9MZkI3RFVUUWM5UnpWTkY4IiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwczpcXFwvXFxcL2Zvcm1zLnRkLm9yZ1xcXFxcXFwvZG93bmxvYWQucGhwP3E9Wm05eWJWOXBaRDB4TVNacFpEMHlNek1tWld3OVpXeGxiV1Z1ZEY4eU1nPT1cIixcImlkXCI6XCJiODM0ZWExN2NmYjQ0NTU1OTUxMjAxOThkOWMwNWMwYlwiLFwidXJsX2lkc1wiOltcIjJhN2QwMzI0NGE5ZjBjMjk3MjAxOGZjOTcxYWE3Yjc0ZDkzMjdmYTdcIl19In0) |
| **How did you become familiar with the Sharing Our Success (SOS) program?** | Saw or heard of SOS from another Chapter Leader |
| **Would you be willing 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**](http://enotification.td.org/track/click/30530608/td.org?p=eyJzIjoiNUY1cGRmSUg0TjktRVVNbFp4clM1QWQ5NUNvIiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwOlxcXC9cXFwvdGQub3JnXFxcL2FsY1wiLFwiaWRcIjpcImI4MzRlYTE3Y2ZiNDQ1NTU5NTEyMDE5OGQ5YzA1YzBiXCIsXCJ1cmxfaWRzXCI6W1wiNTYzOWQ5MmYyNjI4ZmQ3YjQ3YmRjNDRhNzYxY2IwMDliZWVkYzA3ZVwiXX0ifQ)**. Selected session facilitators receive complimentary registration.** | Yes |