

Sharing Our Success (SOS) Submission Form

Chapter Name:	Greater Las Vegas
Chapter Membership Size:	Small (Less than 100)
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Chapter Board Position:	VP of Programming and Professional Development
Chapter Website URL:	www.atdlasvegas.org
Submission Title:	Switching the Chapter's Website from Wild Apricot to Star Chapter

What did you do? (a 2-3 sentence summary of your effort):	The chapter transitioned from Wild Apricot to StarChapter after becoming increasingly dissatisfied with rising subscription costs that offered no additional functionality or improvements for either members or administrators. A transition committee planned and executed the change by coordinating data migration, training board members, and customizing the new site to align with ATD's rebrand. The result was a streamlined, cost-effective platform that enhanced the member experience, simplified administrative workflows, and consolidated event management, financial tracking, surveys, and communications into one system .
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Who benefitted from this effort (Target Audience) Check all that apply:	<input type="checkbox"/> Chapter Members <input type="checkbox"/> Board Members <input type="checkbox"/> Chapter Volunteers <input type="checkbox"/> Potential Chapter Members <input type="checkbox"/> Non-Chapter Members
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Why did you do it? What chapter needs were addressed?

We made the transition to StarChapter to better support our chapter's operational efficiency, communication, and member engagement. Wild Apricot presented several challenges, including limitations in reporting, event email management, and integration with ATD National. Additionally, its annual subscription costs continued to increase without offering additional functionality. In contrast, StarChapter offers a more comprehensive platform at a lower overall cost and includes its own internal payment processor, eliminating the need for a third-party service like AffiniPay. Our goal was to adopt a solution that could streamline board operations, reduce expenses, and enhance the overall experience for both members and chapter leaders.

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.)

Our members reported that the new website is easier to navigate, visually modern, and more professional in appearance-resulting in increased satisfaction and engagement. One of the most impactful improvements has been our ability to create and house surveys and forms directly within StarChapter. This allows us to automatically email attendees a feedback link immediately after each meeting-streamlining data collection, improving response rates, and eliminating the need for paid QR codes or paper evaluations.

Board member onboarding has also become more efficient; most members are now able to take on their administrative responsibilities confidently after a single 60-90 minute training session. Additionally, we've experienced improved customer support, with quicker response times and more helpful guidance when submitting functionality questions or trouble tickets-especially for complex or unfamiliar issues.

Our VP of Finance has noted a significant improvement in financial oversight, citing that StarChapter's financial reports are more detailed, easier to understand, and much simpler to reconcile compared to those produced through our previous platform and third-party processor. The ability to track transactions at the item level-including prorated processing fees-has made monthly reconciliation faster and more accurate, contributing to more transparent and streamlined financial management.

When ATD rebranded and our chapter colors changed from orange and red to blue and green, StarChapter made it easy to implement the updates across the website-saving time and ensuring a consistent visual identity. Additionally, creating new pages or editing existing content is now much simpler and more intuitive, significantly reducing the time required to update the website and maintain accurate, timely communications.

We also streamlined the speaker proposal process by building and hosting the proposal submission form directly within StarChapter. According to our VP of Programming, it is now significantly easier to evaluate proposals and retain records within the system, compared to the previous process of managing Google Forms and exported Google Sheets. This centralized approach has not only improved efficiency but also supports better documentation in case a member is ever audited while renewing their APTD or CPTD certification.

Lastly, we realized overall cost savings by eliminating the need for external payment processors and reducing subscription fees. StarChapter's annual subscription is \$990 compared to Wild Apricot's \$1,243, resulting in an annual savings of approximately \$250 while gaining more robust built-in features that have

streamlined our operations.

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

To implement the transition from Wild Apricot to StarChapter, we followed a structured, step-by-step approach:

1. Leadership-Driven Initiative

The transition was spearheaded by the Chapter President, President-Elect, and VP of Technology, who formed a transition committee to manage the evaluation and implementation process. Prior to any formal decisions, the Chapter President reviewed a StarChapter-powered website operated by another nonprofit and shared insights on its functionality and member experience with the board. This prompted a broader discussion and a formal vote to evaluate and potentially switch platforms.

2. Project Planning & Timeline

Planning began in fall 2023, with the intent to complete the transition before our Wild Apricot subscription ended at the end of March 2024. The formal transition process started in January 2024, giving us a targeted 60-75 day window for implementation and training.

3. Kick-Off & Project Coordination

We initiated the process with a kickoff call with StarChapter's implementation specialist and completed the Project Kick-Off Worksheet. This document required coordination across multiple operational areas, including membership management, event setup, sponsorship, eCommerce, DNS/domain access, and communication tools. Coordination took longer than anticipated-especially for technical items-so we strongly recommend ensuring that chapter IT or web contacts are easily accessible from the start.

4. Data Collection & Migration

We exported and submitted all necessary data from Wild Apricot (member records, event histories, communications, and web content). StarChapter used this to configure our initial website and administrative tools.

5. Implementation Delay Due to Email Filtering

Early in the transition, we encountered a serious delay when our emails were mistakenly filtered into spam by StarChapter's system. This meant our completed materials, questions, and critical updates were not seen by our Customer Transition Specialist for several weeks. The issue added approximately six weeks to our timeline. As a result, we were unable to complete the transition before our Wild Apricot subscription expired, requiring a month-to-month extension at added cost. StarChapter was officially implemented and launched in April 2024.

6. System Training & Template Development

Board members designated as system administrators to manage their respective functions participated in StarChapter's onboarding training. These focused sessions provided hands-on instruction tailored to each role, including membership, communications, events, and finance. Most users felt confident in their responsibilities after a single 60-90 minute session. During the training period, we also began creating templates for recurring email communications (such as event invitations, reminders, and follow-ups) and event planning workflows. These templates have streamlined our processes, ensured consistency across board transitions, and significantly reduced the time needed to set up future events and communications.

7. Website Review & Customization

We reviewed the first draft of the site, submitted revisions, and worked closely with the implementation team to customize layout, pages, and functions. When ATD rebranded, we easily updated the site's color scheme from orange/red to blue/green using StarChapter's tools-making chapter-wide design consistency effortless.

8. Internal Testing & Feedback

Prior to launch, we internally tested all major workflows, including registration, renewals, event promotions, and embedded forms. We also involved a few members to gather feedback on usability and overall design.

9. Go-Live & Member Communication

After final revisions and testing, we launched the new platform and sent out a chapter-wide communication highlighting the transition, key benefits, and how to navigate the new website.

10. Post-Launch Adjustments & Support

After going live, we refined workflows such as membership reporting and email templates to better align with StarChapter's system. Support tickets were handled quickly and professionally, even for more technical questions or uncommon issues.

11. Ongoing Optimization

We continue to take advantage of StarChapter's embedded features, including surveys, polls, and internal forms. Post-event feedback is now gathered using an automated follow-up email, replacing paid QR codes and manual Google Forms. Administrators also report that creating or editing pages is significantly faster and more intuitive than our previous platform.

Is there anything you would do differently?

Yes-while the transition was ultimately successful, there are several things we would do differently to improve efficiency and avoid delays:

1. ☐ Confirm Communication Channels Early

We would proactively confirm that our emails were being received by the StarChapter implementation team. The email filtering issue that routed our messages to the Customer Transition Specialist's spam folder caused a six-week delay. A simple confirmation process early on could have prevented this.

2. ☐ Start Earlier

We began formal implementation in January 2024 with a goal to complete the transition before our Wild Apricot subscription expired at the end of March. In hindsight, starting the process earlier-ideally in late fall-would have provided more buffer time for delays, testing, and internal training.

3. ☐ Assign a Dedicated Project Manager

Although our transition committee functioned well, having one person serve as a centralized point of contact and project manager would have streamlined communication between the chapter and StarChapter. This would have reduced back-and-forth, ensured clearer ownership of deadlines, and prevented overlap in task delegation.

4. ☐ Spend More Time Understanding Workflow and Process Differences

One of the biggest challenges was adjusting to how differently StarChapter manages administrative functions compared to Wild Apricot. For example:

☐ Event emails: Wild Apricot used a single event template with automated workflows, while StarChapter requires multiple emails to be created and linked to each individual event-requiring more setup but offering greater flexibility.

☐ Membership reporting: Wild Apricot had an integrated interface with ATD National for automated updates. StarChapter relies on a more manual process, which we had to build into our monthly routines.

☐ Website management: StarChapter's structured content block system differs from Wild Apricot's more freeform editor. While more efficient long term, it required retraining and adjustment.

☐ Financial tracking: StarChapter prorates processing fees by item, rather than charging a monthly flat fee. This required an update to our reconciliation process-but resulted in clearer, more detailed financial reporting.

In hindsight, we would have taken greater advantage of StarChapter's built-in administrator knowledge base, which

includes searchable articles, tutorials, and system guides. Reviewing these resources early in the process would have helped us proactively redesign our workflows rather than retrofitting Wild Apricot habits into a new platform.

5. □ Engage More End-Users for Testing

While we conducted internal testing before launch, involving a small group of chapter members in structured usability testing would have helped us surface usability issues earlier and refine the site for member experience.

6. □ Include the Full Board in Product Demonstrations

While we did hold a formal product demonstration early in the evaluation process, only the President, President-Elect, and VP of Technology were in attendance. In hindsight, we would have scheduled a second demonstration for the full board. This would have built shared understanding, reduced uncertainty, and allowed each functional lead to ask questions related to their specific responsibilities before the transition began.

When did you start working on this effort?	Oct 01, 2023
When did this effort go live?	Apr 15, 2025
Approximately how many hours were spent working on this? Include an estimate of hours spent across all board members and volunteers.	60
What resources did you use? Check all that apply:	Chapter funds Board Members
How much money was spent?	\$643
Which board positions were involved in the effort?	President, President-Elect, VP of Technology

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

Yes-based on our experience, we offer the following insights to help other chapters plan a smoother transition to StarChapter:

- 1.□Involve Your Full Board Early: Schedule a product demonstration for the entire board, not just your tech-focused officers. Giving all board members a chance to see the platform in action early helps build understanding and buy-in, and allows them to ask questions related to their areas of responsibility.
 - 2.□Establish Clear Project Ownership: Designate a single point person (such as a project manager or transition lead) to coordinate all communication with StarChapter. This streamlines updates, avoids duplication of effort, and ensures deadlines are tracked effectively.
 - 3.□Block Time to Learn the System's Logic: StarChapter is powerful but functions differently from Wild Apricot. Invest time early to understand how workflows are structured, especially around email templates, event setup, and membership processing. Don't try to force old habits into the new system-embrace the change.
 - 4.□Use the Knowledge Base Early and Often: StarChapter's built-in knowledge base is an excellent resource, with articles and how-to guides covering most functions. Encourage your board to consult it regularly and explore features beyond the basics.
 - 5.□Create and Save Templates for Reusability: Develop templates for recurring emails, event structures, and page layouts during your onboarding. These will save significant time and ensure consistency across transitions in board leadership.
 - 6.□Don't Underestimate Testing: Before going live, test everything-registration flows, emails, payment processing, and forms. Involve a few regular members to help identify issues from a user's perspective.
 - 7.□Start Early and Allow Buffer Time: Even with a clear plan, unexpected delays can happen. Give yourself extra time for implementation, review, and revision-especially if your current platform contract is ending.
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How did you become familiar with the Sharing Our Success (SOS) program? Select all that apply:	<div>Chapter Leader</div> <div>ATD Chapter Leaders Conference (ALC)</div> <div>National Advisors for Chapters (NAC)</div> <div>NAC Area Call</div> <div>Chapter Relations Manager (CRM)</div>
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.	<div>Yes</div>
email_consent	true