

Sharing Our Success (SOS) Submission Form

Chapter Name: South Carolina

Chapter Membership Size: Large (250+)

Chapter Contact Person: Kasey McClure McClure

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Phone Number:

Chapter Board Position: President Elect

Chapter Website URL: <https://astd-midlands.wildapricot.org/>

Submission Title: Streamlining Chapter Event Planning with a Comprehensive Learning Event Tracking Template

What did you do? (a 2-3 sentence summary of your effort): As Vice President for Education, I created a comprehensive learning event template that serves as a centralized, dynamic tracking system for our chapter's annual programming. This template provides a structured approach to event planning, management, and documentation.

Who benefitted from this effort (Target Audience) Check all that apply: Board Members
Chapter Volunteers
Other: speakers/preseners

Why did you do it? What chapter needs were addressed?

- Reduce time spent on event preparation and coordination
- Create a clear accountability system for board members
- Develop a central repository of chapter learning events throughout the year
- Systematically track alignment with ATD Capability Model
- Improve institutional memory and historical documentation of chapter programming

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.)

- ☐Reduced event preparation time by approximately 25%
- ☐Improved board member coordination and task management
- ☐Created a comprehensive historical record of chapter learning events
- ☐Enhanced visibility into the chapter's professional development offerings
- ☐Simplified tracking of ATD Capability Model coverage

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

- 1.☐Template Design
 - ☐Developed a comprehensive spreadsheet with multiple functional sections
 - ☐Created clear task ownership and status tracking for each board member
 - ☐Included monthly links to detailed learning event guides
 - ☐Incorporated sections for:
 - o☐Event lifecycle management
 - o☐Task responsibility assignment
 - o☐Task completion status tracking
- 2.☐Learning Event Guide Integration
 - ☐Developed a standardized guide for each learning event containing:
 - o☐Session title
 - o☐Detailed session description
 - o☐Learning objectives
 - o☐Speaker information (bio and headshot)
 - o☐Alignment with ATD Capability Model
 - o☐Additional relevant event details
- 3.☐Implementation and Training
 - ☐Introduced the template to the board during a planning meeting
 - ☐Provided training on how to use and update the document
 - ☐Established clear expectations for maintaining the template

Is there anything you would do differently?

- ☐Implement the template earlier in the year

When did you start working on this effort?

Jan 31, 2025

When did this effort go live?

Feb 01, 2025

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:

ATD Resources
Other: Google Drive

Select the ATD resources you used. Select all that apply:

Other: SOS Website

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

- Start with a simple, easy-to-use template
- Ensure buy-in from all board members
- Regularly review and update the template
- Use the template as a training tool for new board members

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)

<https://www.formstack.com/admin/download/file/19040129430>

additional supporting documents:

<https://www.formstack.com/admin/download/file/19040129431>

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

Chapter Leader
ATD Chapter Leaders Conference (ALC)
Chapter Relations Manager (CRM)
Success Series

Would you be willing to apply to present on this submission at the ATD Chapter Leaders Conference (ALC)? *Request for Proposals (RFPs) open in October of each year at td.org/alc. Selected session facilitators receive complimentary registration.

Yes

email_consent

true