**SOS Submission: Valleys of Virginia Chapter  
SOS Title: Recovery feels so good!**

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| **Submission Date:**  **Chapter Name:** Valleys of Virginia  **Chapter ID:** CH4108 **Chapter Location:** Roanoke, VA **Chapter Membership Size:** 68 | **Contact for this Submission:** Kristina Barkhouser **Email Address:** kbarkhouser@ExcelenPerformance.com **Phone Number:** 434-489-1309  **Chapter Title:** ATD Valleys of Virginia Chapter **Chapter Website URL:** www.roanoke.astd.org |

*When responding to each area, please provide information about who, what, when, how, why, where, and to what degree where appropriate. Also, please be specific and provide enough detail that would allow a leader from a different chapter to pick up this document and mimic your effort.*

**Description of Effort:** Recovering from loss of non-profit status

**Need(s) addressed (please be specific):** Our chapter had lost non-profit status due to failure to file 990N

**What is your chapter’s mission?** To provide leadership to individuals, organizations and society to achieve work related competence, performance, and fulfillment.

**How does this effort align with your chapter mission (Please provide specific examples)?** In order to provide leadership and set a good example for others to achieve work related competence and performance, we must have our own house in order as an organization.

**\*ATD Mission:** **Empower professionals to develop talent in the workplace.\***

**How does this effort align with ATD's mission (Please provide specific examples)?** If we had not regained our non-profit status, this Chapter likely would have folded and we wouldn't be able to provide the benefits of membership to our constituents.

**Target Audience (Who will benefit/has benefited?):** Our Board, our members, and our community.

**Costs/Resource 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 effort required many hours of work from the Board to gather documentation of past financials, contact the IRS about what/how to file, and budget for the applicable fines.

**How did you implement?** *(Please give a brief description.)* Our 2014 President discovered that taxes had not been filed for 2010-2013. Because of that, our non-profit status had actually been revoked in 2010! We were told that in order to reinstate our status, we'd have to provide all financial information from 2010-2013 and complete a 1023 form. We did so and requested reinstatement effective May 10, 2010. However, after filing the 1023, our reinstatement request was declined because it had been more than 15 months since the revocation. We were told to re-file with a more recent date. After much discussion with the IRS to determine what they would need, we were finally reinstated effective February 10, 2015! We desperately wanted to file our back taxes and do everything correctly. This brought about a new challenge regarding how to file for the 2014 tax year, and any previous years, if required. We were determined to be compliant and do everything by the book, but to our surprise, the IRS recommended we not file a 990 until 2015 since we were not technically a recognized non-profit by the IRS from 2010 - 2014. Though that was hard to hear, it was the consequence of failing to complete the task for three years. We paid a $400 fine to the IRS and are happy to say that we're now all straightened out and have already filed our 990N for 2015! We endeavor NEVER to let this happen again. We would encourage all other Chapters to make sure you always file your tax documents. Also, our message would be that if you have a problem like the one we faced, it's not something you can't overcome. Don't close your Chapter and give up! Through the perseverance and diligence of our 2014 and 2015 Boards, our ship is now righted and we expect smooth sailing ahead!

**What were the Outcomes?** *(Please include hard data regarding financial, membership increases, target audience satisfaction levels, publicity for the chapter or for the profession, etc.)* We were able to confidently hold a membership drive in 2015, knowing that we were completely straight with the IRS. We also obtained sponsors for some of our programs. It was nice to complete the 2015 CARE report and share the fact that we are good now!

**Lessons Learned:** *(Hints and tips for other Chapters who may be considering a similar effort)* If your Board discovers some past issues with documentation, financials, reporting, taxes or SCC filings, be transparent and put them out on the table. Solve them as a team and don't give up. It's possible to recover, and though you may pay some fines, you can land on your feet. We were very, very frugal with our budget during this time and ensured that we had the funds to cover any applicable fines. Now we know where we stand and we can be more proactive with investing in the growth of our Chapter.

**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):**

**How did you become familiar with the Sharing Our Success (SOS) program?**

* Saw or heard of SOS from Twitter
* Saw or heard of SOS from Facebook
* Saw or heard of SOS from another Chapter Leader
* Saw or heard of SOS from LinkedIn Chapter Leaders group
* **Saw or heard of SOS on an area call with a NAC representative**
* Found SOS on ATD website
* Other

**Would you be willing to present on this submission at the ATD Chapter Leaders Conference (ALC)?**

**\*Participating chapters receive up to two complimentary registrations for presenters.**

Yes! It's embarrassing, but true...and we might not be the only ones trying to "clean up" the past. We're also glad that ATD National now really pursues each Chapter leader via CARE and correspondence to ensure that they have filed necessary documentation. This may have been done in the past too, but today it seems much less likely that a Chapter could fall into this situation for three years without National intervention.

***Please email completed forms to*** [***SOS@td.org***](mailto:SOS@astd.org) ***along with any supporting documents.***