**SOS Submission:   
SOS Title:** **Using Trello to collaborate with Programs**

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| **Submission Date: 10/17/18** **Chapter Name: Kansas City**  **Chapter ID: CHIP 6027** **Chapter Location: Overland Park, KS** **Chapter Membership Size: Medium** | **Contact for this Submission: Heidi Matthews** **Email Address: heikan2003@gmail.com** **Phone Number: 913-982-6176**  **Chapter Title: Director of Programs and Events** **Chapter Website URL: www.tdkc.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:**

Used Trello to manage chapter projects and events to promote better communication and organization among board members and volunteers

**Need(s) addressed (please be specific):**

When working on events or other projects the trail of emails and other communication as becoming hard to keep track of and organize. Needed one place to keep track of tasks and organize that all stakeholders had access to.

**What is your chapter’s mission?**

Our mission is to promote excellence in the field of learning and development.

**How does this effort align with your chapter mission (Please provide specific examples)?**

It can raise the bar on the communication level particularly among board and volunteers providing a better experience.

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

**How does this effort align with ATD's mission (Please provide specific examples)?**

Helps people to own processes and promote accountability which leads to excellence.

**Target Audience (Who will benefit/has benefited?):**

Board members and volunteers. Ultimately members will benefit by organized programming.

**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.)*

No cost as Trello is free. Can purchase “power ups” but typically not needed. Initial set up of projects under 2 hours. Each project tasks/cards would need to be created. Minimal time.

**How did you implement?** *(Please give a brief description.)*

The idea came from Torrance Learning at a conference they saw them at. The programming director set up the free account and added those that would need access as stakeholders (typically board or volunteers). She used the initial set up intro video (a few minutes) and also went on you tube how to best use Trello and to get ideas. All volunteers get access to each program regardless and they can view what they need. She set it up by event/ program so each item had their own plan in Trello with cards/tasks. For example a folder with webinars. This puts all information in one place and it also provides notifications if something is updated/added/completed so that stakeholders know the status at any time. There is space for comments so someone can leave a comment on a task that others can see. Other areas( such as marketing) can also use this as if they are working on a marketing campaign, they can go to the appropriate place and pull attachments/bios etc. as each folder can have attachments that go with tasks or events. It is a project management system that has helped them not only manage the project but increases communication and access as programs etc. are developed.

**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.)*

Better communication among board members and volunteers. Better work flow thus creating better programs for members. Higher satisfaction among stakeholders.

This also helps align programs with competency model and by introducing something that is a new tech tool hitting a competency model but in a special way for volunteers. A tech tool they were not using before and in a different way. They can use this skill in the chapter and at work.

**Lessons Learned:** *(Hints and tips for other Chapters who may be considering a similar effort)*

Have to have each stakeholder set up a log in in system. Should make sure that there are no firewall issues or blocking issues (esp. if they use a work email or at a healthcare organization). They find that they have had less issues with Trello than other systems. Trello has responsive and helpful customer service if there is an issue (which was rare).

**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**

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