

Sharing Our Success (SOS) Submission Form

Chapter Name: Central Pennsylvania

Chapter Membership Size: Medium (101-299)

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Chapter Board Position: President

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Submission Title: Capability Conversations

What did you do? (a 2-3 sentence summary of your effort): Due to the circumstances of 2020, our chapter needed to pivot from our annual panel event (our largest event of the year). We still wanted to go forward with a virtual event for our members that would bring industry experts and champions to them. We held an TED-like event for our members with the ATD Capability Model as the focus.

Who benefitted from this effort (Target Audience) Check all that apply:

- Chapter Members
- Board Members
- Chapter Volunteers
- Chapter Sponsors
- Potential Chapter Members
- Non-Chapter Members
- Consultants

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

Since 2018, our panel event has been our largest attended event and also our chapter's largest revenue generator (outside of membership dues). When our board began planning out our 2020 events in fall 2019, we knew that we still wanted to have the large panel event in November and began initial planning (dates, speakers, venues, etc.).

Then Covid happened.

Like many of our fellow chapters, our Board looked at our future programming and knew we needed to adapt to the environment. We still offered programming throughout 2020, but since it was virtual, we adjusted our pricing structure. We did not charge any of our members to attend (normally \$20/member per event) and drastically reduced the cost for non-members (from \$40 to \$5). We felt like we hit a good groove and kept members engaged throughout the summer, but we realized that we did not address how we were going to hold our panel event. I think part of us was being optimistic and hoping that we could be in person by November.

By September, we realized that we were running out of time for November (we had a date on our calendar) and no plans to adjust the event. At our September Board Meeting, we began discussing the event and decided that the panel could work via Zoom, but might not be the best avenue with muting/unmuting, talking over people, etc.

Then came an idea---what if we crowd sourced our November event? We have over 130 members and over 300 contacts just in Wild Apricot (and more via LinkedIn) and we know that we have some experts that would love to share with our audiences. We agreed that we could do a "TED-like" where we can give 3-4 presenters the opportunity to share their knowledge and tell their story to our audience.

But how do we keep our presenters on task and relevant to our audience? We came back to what our audience has told us in the past they wanted to hear about: instructional design, leadership development, and diversity and inclusion. We felt a theme---the ATD Capability Model!

By bringing the ATD Capability Model as the event's theme, we were able to bring a focus to our potential speakers, address our member's needs for content they were interested in hearing, pilot a new type of event, and do something that would have little to no cost to our audience and our operating expenses.

Since the event was virtual, we did offer registration to all chapter leaders (through the LinkedIn ATD Chapter Leaders discussion group) and guests of our speakers (who came from multiple states and countries).

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.)

Since we did not charge our members to attend and only charged non-members a nominal fee (\$5), we leverage event sponsorships to cover the financial gap that our chapter was projecting compared to our past annual events. We were able to generate \$900 in event sponsorship (goal was \$600).

Overall, we have 50 registrants for the event (our largest for a virtual event). 37 of the 50 attended the event, including 13 guests/non-members.

Additionally, we received a 5/5 overall satisfaction rating for the event.

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

1. Agree on a date and theme.
2. Work with our chapter's marketing team to create a RFP (request for proposal) communication to be sent to our Wild Apricot contacts and to be posted to our social media channels with information on who to contact and when RFPs were due.
3. Frame out the event structure and flow:
 - a. 5 minutes for event introduction.
 - b. 12-15 minutes/presenter (4 slots).
 - c. 20 minutes for group Q&A with all presenters (we decided it would be easier to do a collective Q&A vs. one after each session to stay on schedule).
 - d. 5 minutes for event wrap up, including event feedback.
4. As a Board, review the RFPs. We felt that it was best for the Board to decide instead of having the event's program manager decided.
5. Upon agreeing on the presenters, we communicated to those that were selected and those that were not.
6. Set up meetings with each presenter to discuss event, objectives, and frame up their presentation, including title.
7. Promote! Promote! Promote!
 - a. We promoted to our members and contacts through Wild Apricot.
 - b. We leveraged our chapter's social media channels (Facebook and LinkedIn).
 - c. We asked all board members to share through their own channels.
 - d. Working with Chapter Services, we obtained a list of all ATD members in Pennsylvania that were not members of a chapter. We refined the list to the Zip Codes in our chapter's footprint and marketed to them.
8. Solicit event sponsors. We reached out to previous event sponsors and our members to generate event sponsorship.
9. Met with each of the presenter's one week prior to the event to run through the event structure and answer any questions.
10. Set up Zoom and rehearse to make sure we were prepared for any technical issues.

Is there anything you would do differently?

If we had to do again, we would start earlier in our planning. We pulled this off in 10 weeks. If we began earlier in the summer, we could have potentially attracted a larger audience.

When did you start working on this effort?	Sep 08, 2020
When did this effort go live?	Nov 17, 2020
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:	Sponsorships/Partnerships Board Members ATD Resources
Was this an in-kind or monetary sponsorship? If monetary, how much was provided? Who were your partners/sponsors? How did you solicit sponsors?	We received \$900 (\$300/sponsor). Our sponsors were Dering Consulting Group, d'Vinci Interactive, and Ready Training Online. All three have been event sponsors in the past and have chapter members as employees.
Which board positions were involved in the effort?	The President-Elect served as the Program Manager. The VP of Marketing lead all event promotion and communication. The VP of Programming lead the sponsorship efforts. Along with these board members, the remaining board members were part of the RFP review process and selected the presenters.
Select the ATD resources you used. Select all that apply:	Chapter Relations Manager (CRM) Power Membership Resources
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/9663334614
How did you become familiar with the Sharing Our Success (SOS) program? Select all that apply:	Chapter Leader ATD Chapter Leaders Conference (ALC) National Advisors for Chapters (NAC) NAC Area Call Leader Connection Newsletter (LCN) Chapter Relations Manager (CRM) Chapter Leader Day (CLD) Success Series

Would you be willing to apply to present Yes
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.
