

Sharing Our Success (SOS) Submission Form

Chapter Name:	Rhode Island
Chapter Membership Size:	Small (Less than 100)
Chapter Contact Person:	Brian Lopes
Email Address:	brian@atdri.org
Phone Number:	
Chapter Board Position:	Chapter President
Chapter Website URL:	https://atdri.org
Submission Title:	ATD Rhode Island Chapter Name Change
What did you do? (a 2-3 sentence summary of your effort):	As part of the chapter's 45th Anniversary in 2024, we reverted to the chapter's original name, ATD Rhode Island, to increase visibility within our home state while continuing to serve the surrounding areas.
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 Sponsors <input type="checkbox"/> Chapter Partners <input type="checkbox"/> Potential Chapter Members
Why did you do it? What chapter needs were addressed?	We changed our name to provide increased name recognition as we endeavor to attract more members, business partners, and sponsors. Rhode Island is a hub of innovation with a strong talent pipeline and some of the BEST Learning & Development programs in the country. As such, we aligned our organization's name and branding with the state that our chapter calls home to foster stronger connections in our local communities and provide even more valuable resources to support the personal and career development of our members.
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.)	<p>In the first 12 months since officially launching our new Chapter name in April 2024:</p> <ul style="list-style-type: none">- Our chapter gained an average of two new members per month.- Our LinkedIn account gained 129 new followers (+29%).- LinkedIn content generated over 15,000 impressions.- Average email newsletter open rate of over 40%.

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

- We first informed our Chapter Relations Manager (CRM) of our intent to change our name and confirmed the process we would have to follow. We also asked for any historical documentation about the chapter's origins, which resulted in our CRM providing the Chapter's original charter from April 1979.
- Our effort started in July of 2023, and we targeted April of 2024 to officially launch our new name, which coincided with the chapter's anniversary.
- A basic Project Tracker was created to organize tasks and due dates, and small working groups of board members were established for Website Redesign, Swag/Merchandise design and ordering, and the President and VP of Finance worked together on technical aspects of the change (IRS, State or RI, bank account, etc.).
- The Chapter submitted the Chapter Name Change Request Form to our CRM (August 2023).
- We purchased new website domains in anticipation of the name change being approved (August 2023).
- We drafted a message to inform members of our intent to change our name which was included in our Season Opening email announcement (September 2023).
- Chapter Membership was asked to approve the name change (November 2023).
- Evidence of Chapter Membership approval of name change sent to CRM (November 2023).
- Name Change request approved by ATD Board of Directors and new logos requested by CRM (December 2023).
- Notification of name change approval by Membership and certification by ATD Board of Directors shared in Chapter Newsletter (January 2024).
- Chapter Bylaws updated to reflect name change and forwarded to CRM (January 2024).
- New Chapter logo provided by CRM (February 2024).
- We requested a cloned site from Wild Apricot - this is a free site that Wild Apricot provided for us to experiment with different templates and designs for our updated website (February 2024).

- Chapter Social Media Avatar requested (February 2024).
- Chapter Social Media Avatar received, and black and white versions of new Chapter logo requested (for swag/merch) and received from CRM (March 2024).
- First batch of new Chapter swag ordered, including stickers, retractable signage, and a registration tablecloth (March/April 2024).
- A Chapter member, who is also a photographer, volunteered to take original photographs throughout the state of Rhode Island that we could use on our new website and other chapter collateral (photography delivered to Chapter in April 2024).
- New ATD Rhode Island Instagram account created (April 2024).
- NAC sent email to CRM requesting Chapter's name be updated within National's documentation including CHIP code/ATD Store.
- New website approved by Chapter Board (April 2024).
- Chapter LinkedIn and YouTube accounts updated (April 2024).
- Name change video created and posted to Chapter website (April 2024).
<https://atdri.org/resources/ATDRIwebsite/Video/ATDRI-Name-Change.mp4>
- As part of comms/marketing/awareness campaign leading up to official ATD Rhode Island launch, additional messaging was included in the April 2024 newsletter, the new website was teased, the new Instagram account was announced, and new Chapter swag was provided to attendees at the Chapter's April in-person event.
- The Chapter's new name was announced in conjunction with the Chapter's 45th Anniversary on April 25, 2024. An email which included a link to the name change video, updated website URL, links to re-branded LinkedIn and YouTube pages and new Instagram account was sent to Chapter contacts. The email also promoted the June in-person event, which promised new Rhode Island Chapter swag as a special gift to attendees. The name change announcement and video was also shared on LinkedIn.
- Additional swag, including pens, sticky notes, and change purses ordered (May 2024).
- Updates to the chapter's domain in Wild Apricot, Google

Workspace, and Google email addresses were made over the summer (May/June/July 2024).

- We updated the chapter's DBA with the State of Rhode Island (December 2024).

- We did not update the Chapter's name/DBA with our bank since it seemed that it wasn't updated when ASTD became ATD. We chose to defer this action until the next time account ownership was changed when a new President/VP of Finance were installed.

Is there anything you would do differently?	<p>- We would have requested a new Chapter Social Media Avatar to be delivered along with Chapter logo - we had to request separately which caused a delay.</p> <p>- We would have asked our CRM if any changes were coming to ATD branding - shortly after ordering new swag, we were notified that ATD colors/branding were changing.</p>
When did you start working on this effort?	Jul 01, 2023
When did this effort go live?	Apr 25, 2024
Approximately how many hours were spent working on this? Include an estimate of hours spent across all board members and volunteers.	200
What resources did you use? Check all that apply:	<p>Chapter funds</p> <p>Volunteers</p> <p>Board Members</p> <p>ATD Resources</p> <p>Other: Wild Apricot sandbox site</p>
How much money was spent?	\$1875
How many volunteers were you able to recruit?	1
Which board positions were involved in the effort?	All
Select the ATD resources you used. Select all that apply:	<p>Chapter Relations Manager (CRM)</p> <p>National Advisors for Chapters (NAC)</p> <p>Other: Other Chapter Leaders (WV/Appalachia Chapter)</p>
Do you have any additional insights to share with other chapters implementing this effort?	<p>While completing this form, I discovered that our chapter's OLD name was still reflected in the first drop down menu (Chapter Name) - so, you should also request that your chapter's name is updated in the SOS Submission Form :-)</p> <p>Can someone please update this form? Replace Bay Colonies with Rhode Island. thank you!</p>

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/17975640275>

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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)
Other: Previous Chapter SOS Recognition

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.

Yes
