

## Sharing Our Success (SOS) Submission Form

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**Chapter Name:** Greater Atlanta

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**Chapter Membership Size:** Large (300+)

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**Chapter Contact Person:** Allison Baldwin

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**Email Address:** president@atdatlanta.org

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**Phone Number:** (770) 375-7684

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**Chapter Board Position:** President

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**Chapter Website URL:** <https://atdatlanta.org/>

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**Submission Title:** Facilitate a sprint retrospective to gain insight into your board members leadership experience

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**What did you do? (a 2-3 sentence summary of your effort):** For our May executive board meeting, I conducted a sailboat retrospective in the collaboration tool, Miro. Our entire board is new, and I wanted to see what was working, challenges, and future risks to help correct any immediate issues or level-set expectations.

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

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**Why did you do it? What chapter needs were addressed?** Our entire board is new in their role, and I wanted to see what was working, challenges, and future risks since in role. By the end of the meeting, we had identified positive and negative trends happening within our team and the chapter in general.

We quickly solved a couple of issues, like how our team communicates. We have ATD emails and use Slack. We decision to solely communicate with each other in Slack vs Slack AND email. This helps streamline communications and sets expectations on when to use each tool for communication.

Volunteer loss and succession planning were trends on our future risks section. Through our discussion, we discovered a gap after a new volunteer attends orientation and when they are connected to a chapter leader. Since we are still mainly virtual, we realized new volunteers may need an ambassador/peer coach to help make them feel welcome and serve as a liaison in the event a chapter leader isn't responsive or engaging the volunteer. We identified a couple of active members who could serve as the welcome committee.

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<b>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.)</b>	We streamlined communication for the board. Establishing a stronger engagement strategy with new volunteers will help minimize volunteer loss and improve succession planning.
<b>What steps did you take to implement this effort? (Remember that other chapter leaders will use this to replicate the effort. Be specific)</b>	<ol style="list-style-type: none"> <li>1. Decided to use Miro as the tool to collect feedback. Facilitators can use any collaboration tool of their choice, as long as attendees can also access it to write their notes</li> <li>2. Determined what I wanted to discuss. I added our strategic goals, the sailboat retrospective board, and a Start, Stop, and Continue board to visually document our action items</li> <li>3. Communicated the purpose for this particular executive board meeting</li> </ol>
<b>Is there anything you would do differently?</b>	Know ahead of time when I'd want to have this retrospective and add it to the board meeting calendar. Everyone would be aware of the date and have time to prepare and keep track of notes. Sometimes it's hard to think on the spot, in four minutes, and something from a few weeks or months ago might not be captured.
<b>When did you start working on this effort?</b>	Apr 01, 2022
<b>When did this effort go live?</b>	May 03, 2022
<b>Approximately how many hours were spent working on this? Include an estimate of hours spent across all board members and volunteers.</b>	3
<b>What resources did you use? Check all that apply:</b>	Board Members
<b>Which board positions were involved in the effort?</b>	All
<b>Do you have any additional insights to share with other chapters implementing this effort?</b>	I recommend facilitating this just before mid-term. It gives you time to see what's working well or not working well earlier in the year vs towards the end of the year.
<b>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)</b>	<a href="https://www.formstack.com/admin/download/file/12754118650">https://www.formstack.com/admin/download/file/12754118650</a>

**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)  
Chapter Leader Day (CLD)

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**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](http://td.org/alc). Selected session facilitators receive complimentary registration.** Yes

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