

Sharing Our Success (SOS) Submission Form

Chapter Name: Central Florida

Chapter Membership Size: Medium (101-299)

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Chapter Board Position: Past President

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Submission Title: Streamlining Board Reports & Meetings

What did you do? (a 2-3 sentence summary of your effort): We created a template for the monthly board reports required from each vertical area. Each board member completes the slides for their designated area. The slide deck is then used during the monthly meeting. Notes for the meeting are captured in the slide notes area.

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

Why did you do it? What chapter needs were addressed? Each month we were finding how tedious and difficult it was to get all board members to complete their reports. We tried several methods prior to this template such as a form they filled out and answered a few questions, but we were not able to capture all the information or data visuals via those methods.

The Google Slides template allows us to add notes, images, and include the information in a way that it follows the monthly meeting agenda. This helps facilitate the meetings with ease, each board member provides a high-level summary of what occurred, what they are working on for the next few months, and any assistance they may need.

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.) We did not set any measurable outcomes for this endeavor. The goal was to have a more efficient method of capturing work being done by board members and presenting the information during the board meetings. We started the process in March of 2022, and it has helped us achieve compliance from board members in their reports. The method also provides an easier format for capturing/displaying visual data, projects board members are working on, chapter goals, and chapter metrics related to CARE goals.

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| What steps did you take to implement this effort? (Remember that other chapter leaders will use this to replicate the effort. Be specific) | <p>Our Director of Operations created the template and then discussed it during a chapter meeting setting the expectation for board members to use it the following month for their reports.</p> <p>Each month several days prior to the board meeting the director shares the link for the monthly deck and board members complete their reporting.</p> |
| Is there anything you would do differently? | <p>The template continues to grow as we find there are other things we would like to see during monthly meetings.</p> <p>For example, the first template did not include slides for Chapter Health Metrics. This was added after discussion during a board meeting around the topic.</p> <p>The CARE Metrics slide was also added after having discussions around that topic.</p> <p>This is a living document which will continue to evolve.</p> |
| When did you start working on this effort? | Feb 08, 2022 |
| When did this effort go live? | Mar 08, 2022 |
| Approximately how many hours were spent working on this? Include an estimate of hours spent across all board members and volunteers. | 10 |
| What resources did you use? Check all that apply: | <p>Board Members</p> <p>Other: Google Slides</p> |
| Which board positions were involved in the effort? | All board members |
| Do you have any additional insights to share with other chapters implementing this effort? | Have conversations with your board volunteers to identify what you want to capture/report and be open to being flexible. As your chapter needs change, the reporting may need to change. |
| 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/13846569197 |
| additional supporting documents: | https://www.formstack.com/admin/download/file/13846569198 |
| additional supporting documents: | https://www.formstack.com/admin/download/file/13846569199 |

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)
Leader Connection Newsletter (LCN)
Chapter Relations Manager (CRM)
Chapter Leader Day (CLD)
Other: I have previously submitted SOS ideas on behalf of our chapter.

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.

email_consent true
