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| **Chapter Name**  | Dallas |
| **Chapter Number (ex. CH0000)**  | CH7017 |
| **Chapter Location (City, State)**  | Dallas, TX |
| **Chapter Membership Size**  | Large (350+) |
| **Contact Person for this Submission:**  | Laurie Lumston |
| **Email Address:**  | llumston@primelending.com |
| **Phone Number:**  | (972) - 743 - 7358 |
| **Chapter Board Position:**  | Director |
| **Chapter Website URL:**  | [http://tddallas.org](http://enotification.td.org/track/click/30530608/tddallas.org?p=eyJzIjoiZ1BNX2dVUTV1VDQ2NHQzcFp3Z2RWb05iZkJzIiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwOlxcXC9cXFwvdGRkYWxsYXMub3JnXCIsXCJpZFwiOlwiZmI0NTFkNWQ3MWZjNDZiY2JlYzJiNGEyZDA1Y2NhNGFcIixcInVybF9pZHNcIjpbXCI1NjE2NzAxMDhlZTQxMTgzYTFjN2E3YjBkZjk0NmE3ZmM3MzMxNTQ2XCJdfSJ9) |
| **Submission Title:**  | Getting to the Summit Using Basecamp |
| **Submission Description:**  | Our community of volunteers work hard to make our chapter one of the most active, viable ATD chapters in the country. We struggled with how to share information with our team of over 40 volunteers. We needed one place where we could store chapter documents and communicate with the volunteers so that it didn’t count against anyone’s personal account storage limits. We needed a 360° view from the mountaintop that everyone could access. Enter Basecamp. Basecamp is a project management platform used in many businesses to share project resources and communicate with team members without using email. The Basecamp website says it perfectly, “All growing businesses run into the same fundamental problems. Hair on fire, buried under email, stuff everywhere.” This can be said about ATD chapters. We’re volunteer-run organizations whose members have a day job, families, and other responsibilities. Their time is valuable and we want to honor and respect that by giving these volunteers a better experience--you can say that we are helping them help us.ATD Dallas implemented Basecamp in 2018 to move conversations out of siloed groups, out of email and into a place where everyone owns the content that is shared.  |
| **Need(s) Addressed? Please be specific.**  | We have a lot going on that needs to be communicated effectively in order to be successful: Monthly chapter meetings, 5 Special Interest Groups that met weekly across the city, webinars, workshops, our annual conference (Southwest Learning Summit) and the end-of-the-year celebration and awards event (AXIS Awards). All of these events are planned by four main functions of the organization: Programs, MarCom, Professional Development and Membership. During a lunch meeting of the Volunteers of the Year (individuals in the chapter from each of these areas, who gave exceptional time and energy for the chapter), each volunteer described what they did for the chapter and it became apparent that these highly-involved volunteers had no idea what was happening in other areas of the organization. That needed to change. We began searching for a means of communicating with one another internally that would help break down those barriers that isolated our teams.  |
| **What is your chapter's mission?**  | ATD Dallas exists to advance people and improve organizations. We achieve this mission on the kindness and availability of volunteers. |
| **How does this effort align with your chapter's mission (Please provide specific examples)?**  | We’ve struggled with how to engage and communicate with or volunteers in years past. We also asked many questions that weren’t always the easiest to answer: How many volunteers do we have at any given time? Who were they? Which teams are these volunteers serving on? How can we communicate with these volunteers in order to communicate with them? How do we share documents with them? How do we provide value to volunteers and respect their time commitments to keep them engaged and productive?In an effort to build more engagement with our volunteers, foster communication and organization, we implemented Basecamp as an investment in our chapter, but most importantly our volunteers. By making our volunteers more effective and up to date on chapter information, we’re empowering them to stay “in the know” and more engaged – which of course trickles down to result in more engaged and satisfied members. |
| **National ATD's mission is to "empower professionals to develop talent in the workplace". How does this submission align with ATD's mission? Please provide specific examples.**  | Basecamp embodies empowering professionals to develop talent in the workplace because it gives the ATD Dallas volunteers and professionals a place where they can ask questions, communicate with leadership and not just the leadership of the team on which they serve. Basecamp gives the volunteers the ability to see what discussions were had before they joined the team. The biggest organizational win that Basecamp provides to our chapter and its volunteers is the ability to effortlessly share documents back and forth without any one person losing it in their email inbox or battling their ever-full Dropbox. We are empowering communication.  |
| **Target Audience: (Who will benefit/has benefited from this effort?)**  | Basecamp is a hub of communication for active volunteers who are involved with planning and advertising events and engaging our members. It is a flexible tool that has a separate “card” for each team and each project. Each team and each project card contain spaces to chat (Campfire), post messages that need lengthy dialogue (Message Board), schedule meetings (Schedule), create tasks (To-Do), give a thumbs-up or approval (Boost), create monthly reminders (Check-ins) and store files (Docs & Files). When someone is on-boarded as a volunteer for Programs, they receive access to our Basecamp site, and are assigned to the Programs team, where they can interact with other volunteers. If they need access to another team, they are simply assigned to that team, but they always have access to every volunteer on the HQ card, which contains all of the features of every other card. The HQ card by itself was worth the investment. The tool also contains a Ping feature, where volunteers can have private conversations with one or more other volunteers.  |
| **Costs/Resources 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)**  | When we were considering whether to use Basecamp with our volunteers, a core group of leadership team members and active volunteers began using the trial version of Basecamp (free for 30 days) to see if the platform would aid in our communication and organization of chapter information and communication with all members.Basecamp costs the chapter approximately $900/year with the non-profit discount. Leadership team members are admins of the site and are responsible for adding new volunteers to Basecamp. We consider the price of the platform to be an investment in our chapter’s volunteers, so we did not seek donations or sponsorship for the platform. |
| **How did you implement: (please give a brief description)**  | This was one of the easiest launches of a new tool. It’s intuitive. It welcomes interaction. We simply designated admins, who added our volunteers (currently there are over 40) by inputting their name and email address. Immediately, there was a flurry of conversation in HQ by volunteers from every area of the organization. That initial conversation transformed into meaningful collaboration as volunteers began to post for needs they had in their areas. Those needs were quickly met as others offered resources, insights and leads to help their fellow-volunteers. We’ve continued to refine Basecamp’s use, and still have some work to do to move volunteers who are used to email. We’ve also started to move over documents that were previously stored in Google Drive or Drop Box or sent as attachments on emails. This has provided transparent access to historical and detailed information. It’s effectively replacing ‘tribal knowledge’ with shareable, accessible information that benefits everyone. |
| **What were the Outcomes: (Please include hard data regarding financial gains, membership increases, target audience satisfaction levels, publicity for the chapter or for the profession, etc.)**  | Barriers between our four distinct operating areas began to crumble almost immediately as everyone communicated via the HQ card. Transparency in the organization and excitement about what other areas were doing increased significantly. Basecamp has become a hub for streamlining our processes. Rather than sending a write-up to MarCom via email, someone creating an image for the write-up and emailing it back, someone creating copy for social media for the event and emailing it to everyone and then sending all of it via email to our admin to post on the website, Basecamp is now our one-stop shop for collecting all of this information. Easy access to everything we need for every event, every project. It has saved all volunteers time and kept our email from blowing up! |
| **Lessons Learned: (hints and tips for other chapters who may be considering a similar effort)**  | Basecamp creates a lot of email, which is exactly the problem we tried to move away from. We encouraged volunteers to switch the email notifications to only a daily reminder. We also strongly encouraged the members to download the Basecamp app to their smart devices and turn off notifications there. When there’s a new topic that has been posted to Basecamp, a red dot appears on the app. Upon log-in, there’s an area to see what has been added to the board, by whom and to which area. This cuts down drastically the number of email the Basecamp platform sends out.Train volunteers ASAP. A core group of leadership and active volunteers piloted the platform and once the board agreed to implement, we waited a little while to train the volunteers. However, once we planned a group meeting, we showed them the various areas of the platform, what each meant, and answered questions about how to work Basecamp into the team workflows. This was a tremendous help to have a majority of the volunteers together so that they could ask questions, hear other questions everyone had, and see how easy it is to use the Basecamp platform. This increased adoption even more than what we had at the original launch. |
| **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.):**  | Basecamp is available to all the chapter resources and gives us a way to organize all of them into one location. No one has to use personal Dropbox space or email space to support the chapter. Everyone has a log-in to Basecamp, so everyone owns the chapter documentation. We’ve made our by-laws accessible to the leadership team. We post the monthly financial documents and the executive board meeting notes to the team card so that whenever there’s a question about what we discussed at a meeting, the notes are available to reference.  |
| **Please attach any documents that help support this submission: (additional documents and documents over 2MB should be sent to Samantha Herman,** sherman@td.org**)**  |  [Basecamp Mobile App.pdf](http://enotification.td.org/track/click/30530608/forms.td.org?p=eyJzIjoiZ2ZGcTZORDYwaDB6T1JVWGVZamU2RDBhdHE4IiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwczpcXFwvXFxcL2Zvcm1zLnRkLm9yZ1xcXFxcXFwvZG93bmxvYWQucGhwP3E9Wm05eWJWOXBaRDB4TVNacFpEMHhPRGNtWld3OVpXeGxiV1Z1ZEY4eE5nPT1cIixcImlkXCI6XCJmYjQ1MWQ1ZDcxZmM0NmJjYmVjMmI0YTJkMDVjY2E0YVwiLFwidXJsX2lkc1wiOltcIjJhN2QwMzI0NGE5ZjBjMjk3MjAxOGZjOTcxYWE3Yjc0ZDkzMjdmYTdcIl19In0) |
| **additional supporting documents:**  |  [Basecamp Webpage.pdf](http://enotification.td.org/track/click/30530608/forms.td.org?p=eyJzIjoiaWFhSXhJRkM1WV9BMnFoSHNGM3diWVcxZHhnIiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwczpcXFwvXFxcL2Zvcm1zLnRkLm9yZ1xcXFxcXFwvZG93bmxvYWQucGhwP3E9Wm05eWJWOXBaRDB4TVNacFpEMHhPRGNtWld3OVpXeGxiV1Z1ZEY4eU1nPT1cIixcImlkXCI6XCJmYjQ1MWQ1ZDcxZmM0NmJjYmVjMmI0YTJkMDVjY2E0YVwiLFwidXJsX2lkc1wiOltcIjJhN2QwMzI0NGE5ZjBjMjk3MjAxOGZjOTcxYWE3Yjc0ZDkzMjdmYTdcIl19In0) |
| **How did you become familiar with the Sharing Our Success (SOS) program?**  | Saw or heard of SOS on an area call with my NAC |
| **Would you be willing 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://enotification.td.org/track/click/30530608/td.org?p=eyJzIjoiQWFuZ2Z0NXBXZVhlUEJYWUY3NWo1TklrcE44IiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwOlxcXC9cXFwvdGQub3JnXFxcL2FsY1wiLFwiaWRcIjpcImZiNDUxZDVkNzFmYzQ2YmNiZWMyYjRhMmQwNWNjYTRhXCIsXCJ1cmxfaWRzXCI6W1wiNTYzOWQ5MmYyNjI4ZmQ3YjQ3YmRjNDRhNzYxY2IwMDliZWVkYzA3ZVwiXX0ifQ)**. Selected session facilitators receive complimentary registration.**  | Yes |