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| **Chapter Name** | ATD Baton Rouge Chapter |
| **Chapter Number (ex. CH0000)** | CH7121 |
| **Chapter Location (City, State)** | Baton Rouge, LA |
| **Chapter Membership Size** | Medium (101 - 349) |
| **Contact Person for this Submission:** | Elizabeth Beckham |
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| **Phone Number:** | (225) - 300 - 8157 |
| **Chapter Board Position:** | 2017 Past Presdient |
| **Chapter Website URL:** | [http://www.atdbatonrouge.org/](http://enotification.td.org/track/click/30530608/www.atdbatonrouge.org?p=eyJzIjoiWlhoaFFMMnQ1V3lKbnJiSm1lSUtqREZadHl3IiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwOlxcXC9cXFwvd3d3LmF0ZGJhdG9ucm91Z2Uub3JnXFxcL1wiLFwiaWRcIjpcIjgzNWZlN2ZmYzNlMjQwZjA4MjRhODQwYTI1YzkyMmQ3XCIsXCJ1cmxfaWRzXCI6W1wiOWM5YmMwYmIyMjVhYjliZmFmY2ZmMGZjNjNhYWQwNmE2ZjkwNzJiNFwiXX0ifQ) |
| **Submission Title:** | The Way We Were: Capturing and Archiving Your Chapter's History |
| **Submission Description:** | Presentation & job aids distributed at ALC 2015 by Dr. Janina Fuller of the ATD Baton Rouge Chapter. During her time on the ATDBR board, Dr. Fuller completed a records review from 1998 to present and archive research process of all of the history of ATD in this region. Dr. Fuller presented this information at ALC, and I feel that this should also be listed as a share our success. Chapter record management and retention is an essential piece of chapter administration and continuity of operations from one board to the next. |
| **Need(s) Addressed? Please be specific.** | Chapter record management and document retention |
| **What is your chapter's mission?** | The mission of the Baton Rouge Chapter of the Association for Talent Development is through exceptional learning and performance, we create a workforce that works better and a community committed to adult professional development. |
| **How does this effort align with your chapter's mission (Please provide specific examples)?** | Chapter record management and retention is an essential piece of chapter administration and continuity of operations within the Baton Rouge Chapter. |
| **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.** | This submission encourages chapters to adhere to ATD National records retention guide and have a plan in place to document chapter activities which in turn support National ATD's mission. |
| **Target Audience: (Who will benefit/has benefited from this effort?)** | Chapter leaders |
| **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)** | Our chapter secretary lead this effort and it took up hours of her time during her term. Monetary resources were allocated in ATDBR budget. Our chapter also supplemented Dr. Fuller's travel to ALC to present this information when her time on the board had ended. |
| **How did you implement: (please give a brief description)** | 1. Create a team; Identify accountabilities  2. Gather up the records; reach back as far as you  can find people who might be holding onto  chapter history  3. Create a protocol for folder and file naming  4. Sort by year  5. Sort by content  6. Decide what to needs to be kept as hard copy  7. Decide what gaps you’ll try to fill  8. Identify a repository |
| **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.)** | We learned about ATD's founder - Thomas S. Keaty II Dr. Fuller shared her research with ATD National and presented at ALC 2015. Ensured chapter compliance with ATD National Records Retention Guide Identified chapter historian and placed role into chapter job description Our chapter has an organized hard copy archive housed at local library and established procedure to ensure essential records are added once the year has closed. |
| **Lessons Learned: (hints and tips for other chapters who may be considering a similar effort)** | • Make sure that your board is aware of ATD National Records Retention Guide & adhering to the guide.  • Don’t throw away anything until you’ve looked carefully at everything • Expect to handle every piece of paper/digital file and more than once  • Keep labeling supplies handy: multi-colored stickies, pencils, pens, staple remover, fresh paper clips, manila folders, tab markers  • Date undated documents (using stickies!) if possible; start NOW to date every document you generate Think about why you’re keeping each item:  – How much did things cost?  – What procedures have already been tried?  – Where did meetings used to take place?  – Are there trends in membership attendance  • Be prepared for piles of refuse that you won’t want to put in the garbage (shred?)  • The march of time is not kind to paper clips. Don’t use them in paper files. |
| **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.):** | ATD National Records Retention Guide |
| **Please attach any documents that help support this submission: (additional documents should be sent to Samantha Herman,** [sherman@td.org](mailto:sherman@td.org)**)** | [SS3\_ TheWayWeWere\_a.pdf](http://enotification.td.org/track/click/30530608/forms.td.org?p=eyJzIjoiRlZLZXlZMW1xc0pxcmE0c1pVbEMwOF9lcm5VIiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwczpcXFwvXFxcL2Zvcm1zLnRkLm9yZ1xcXFxcXFwvZG93bmxvYWQucGhwP3E9Wm05eWJWOXBaRDB4TVNacFpEMHhNelVtWld3OVpXeGxiV1Z1ZEY4eE5nPT1cIixcImlkXCI6XCI4MzVmZTdmZmMzZTI0MGYwODI0YTg0MGEyNWM5MjJkN1wiLFwidXJsX2lkc1wiOltcIjJhN2QwMzI0NGE5ZjBjMjk3MjAxOGZjOTcxYWE3Yjc0ZDkzMjdmYTdcIl19In0) |
| **additional supporting documents:** | [SS3\_TheWayWeWere\_b.pdf](http://enotification.td.org/track/click/30530608/forms.td.org?p=eyJzIjoib1pmX2ZCS0pneXdkdy1NQzIxNWtiSGdVLXZFIiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwczpcXFwvXFxcL2Zvcm1zLnRkLm9yZ1xcXFxcXFwvZG93bmxvYWQucGhwP3E9Wm05eWJWOXBaRDB4TVNacFpEMHhNelVtWld3OVpXeGxiV1Z1ZEY4eU1nPT1cIixcImlkXCI6XCI4MzVmZTdmZmMzZTI0MGYwODI0YTg0MGEyNWM5MjJkN1wiLFwidXJsX2lkc1wiOltcIjJhN2QwMzI0NGE5ZjBjMjk3MjAxOGZjOTcxYWE3Yjc0ZDkzMjdmYTdcIl19In0) |
| **additional supporting documents:** | [SS3\_TheWayWeWere\_c.pdf](http://enotification.td.org/track/click/30530608/forms.td.org?p=eyJzIjoidGpYa2JyaC1FN0t6U2NmTVdkMmxvdURRb1VrIiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwczpcXFwvXFxcL2Zvcm1zLnRkLm9yZ1xcXFxcXFwvZG93bmxvYWQucGhwP3E9Wm05eWJWOXBaRDB4TVNacFpEMHhNelVtWld3OVpXeGxiV1Z1ZEY4eU13PT1cIixcImlkXCI6XCI4MzVmZTdmZmMzZTI0MGYwODI0YTg0MGEyNWM5MjJkN1wiLFwidXJsX2lkc1wiOltcIjJhN2QwMzI0NGE5ZjBjMjk3MjAxOGZjOTcxYWE3Yjc0ZDkzMjdmYTdcIl19In0) |
| **additional supporting documents:** | [SS3\_TheWayWeWere\_d.pdf](http://enotification.td.org/track/click/30530608/forms.td.org?p=eyJzIjoieVVvZjhRUTYzbDVGdzFOLW8tUmdQcWtjYnpBIiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwczpcXFwvXFxcL2Zvcm1zLnRkLm9yZ1xcXFxcXFwvZG93bmxvYWQucGhwP3E9Wm05eWJWOXBaRDB4TVNacFpEMHhNelVtWld3OVpXeGxiV1Z1ZEY4ek1RPT1cIixcImlkXCI6XCI4MzVmZTdmZmMzZTI0MGYwODI0YTg0MGEyNWM5MjJkN1wiLFwidXJsX2lkc1wiOltcIjJhN2QwMzI0NGE5ZjBjMjk3MjAxOGZjOTcxYWE3Yjc0ZDkzMjdmYTdcIl19In0) |
| **How did you become familiar with the Sharing Our Success (SOS) program?** | Found SOS on ATD website |
| **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=eyJzIjoiSFFvNjJiTDI4dHF1S0xCUk0xRklleW15S1VZIiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwOlxcXC9cXFwvdGQub3JnXFxcL2FsY1wiLFwiaWRcIjpcIjgzNWZlN2ZmYzNlMjQwZjA4MjRhODQwYTI1YzkyMmQ3XCIsXCJ1cmxfaWRzXCI6W1wiNTYzOWQ5MmYyNjI4ZmQ3YjQ3YmRjNDRhNzYxY2IwMDliZWVkYzA3ZVwiXX0ifQ)**. Selected session facilitators receive complimentary registration.** | Yes |