Sharing Our Success (SOS) Submission Form

Chapter Name:	Central Indiana
Chapter Membership Size:	Medium (101-299)
Chapter Contact Person:	David Jarvis
Email Address:	president@atdcentralindiana.org
Phone Number:	3173619843
Chapter Board Position:	President
Chapter Website URL:	https://atdcentralindiana.org/
Submission Title:	Monitoring Chapter Health with Meaningful Metrics
What did you do? (a 2-3 sentence summary of your effort):	ATD CIC Board of Directors identified meaningful metrics that allows us to gauge our chapter's health. Each leader considered indicators of good health for their respective areas and confirmed data sources were available. Collectively, all measures were integrated into a scorecard using Google Sheets. The scorecard is populated and review each month in our Board meeting.
Who benefitted from this effort (Target Audience) Check all that apply:	Chapter Members Board Members Chapter Sponsors Potential Chapter Members
Why did you do it? What chapter needs were addressed?	Historically, the leaders of this chapter are engaged and fully participatory in the repeated activities and operations of the chapter. However, our leadership team was not adept at using the many sources of data to gauge our impact and predict future success. This project was an attempt to increase our use of data to drive decisions by the leadership team. We needed to understand the measures that are predictors of our success and begin collecting and reviewing the data with routine frequency.

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.)	The adage "What gets measured gets improved" is true. The identification of meaningful metrics and the monthly review of a scorecard has increased the leadership team's focus on the indicators of our success and de-emphasized the business of routine actions and operations. Our focus has shifted. We now utilize data to track the following parameters: Marketing and Communications Reach and Engagement Membership Growth and Retention Rates Financial Health; P/L Review and Sponsorships Programming Attendance and Evaluation data
What steps did you take to implement this effort? (Remember that other chapter leaders will use this to replicate the effort. Be specific)	1. Gauge the interest and readiness of leadership to use data to drive decisions and predict success. Bring them along on the journey. 2. Build the leadership team into the process of identifying meaningful metrics, aligned to CARE principles. Ask: How do you know your efforts are impactful and your respective area is "healthly?" 3. Identify current tools used for data collection and reporting. 4. Confirm data sources are available for any proposed metrics. 5. Identify any barriers to data analysis and reporting. 6. Co-create the scorecard with the leadership team. Decide where this will live (Suggest a collaboration space like Google Suite for real time updates and sharing.) 7. Establish accountability and communicate expectations on use. 8. Gauge adoption and engagement by leaders after a period of several months. 9. Coach and support to increase engagement and use.
Is there anything you would do differently?	In an ideal world, all tools would integrate for the easy transfer of data eliminating any manual manipulations of information. The design, development and implementation are the heavy lift. Then, each leader spends about 45-60 minutes monthly to review and update the scorecard.
When did you start working on this effort?	Oct 01, 2023
When did this effort go live?	Jan 01, 2024

Approximately how many hours were spent working on this? Include an estimate of hours spent across all board members and volunteers.	40
What resources did you use? Check all that apply:	Board Members Other: Wild Apricot, Google Suite, Banking Accounts, and other data sources.
Which board positions were involved in the effort?	All of them.
Do you have any additional insights to share with other chapters implementing this effort?	Build your leadership team into the design and development from the start. This will support higher adoption rates. The URL to the Google Sheet is provided here. I will need to grant access to the Reviewer. Please reach out for access to the tool.
How did you become familiar with the Sharing Our Success (SOS) program? Select all that apply:	Chapter Leader
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
email_consent	true