

## Sharing Our Success (SOS) Submission Form

<b>Chapter Name:</b>	Northeast Florida
<b>Chapter Membership Size:</b>	Small (Less than 100)
<b>Chapter Contact Person:</b>	Poonam sahotra
<b>Email Address:</b>	president@atdnefl.org
<b>Phone Number:</b>	
<b>Chapter Board Position:</b>	President 2025
<b>Chapter Website URL:</b>	<a href="https://atdnefl.org">https://atdnefl.org</a>
<b>Submission Title:</b>	Event Submission - Leveraging Microsoft Planner/Forms to Operationalize Events
<b>What did you do? (a 2-3 sentence summary of your effort):</b>	An Event Submission process was created to reduce the need for "back and forth" communication between board members that "touched" and owned the posting of events via multiple medias such as chapter newsletter, social media announcements and chapter website.
<b>Who benefitted from this effort (Target Audience) Check all that apply:</b>	<input type="checkbox"/> Chapter Members <input type="checkbox"/> Board Members

**Why did you do it? What chapter needs were addressed?**

- We were able to leverage existing technology to streamline our event submission process in a way that fosters clarity and collaboration across the board.
- Each event now begins with a Microsoft Form that captures all the essential details upfront-ensuring we have the right information from the start.
- Once submitted, the event is funneled into Microsoft Planner, which serves as a central hub and single source of truth.
- This checklist-driven system not only helps fill any potential gaps but also gives board members a high-level view of what's happening each month-when events are occurring, where graphics live, and what's needed to move each task forward.
- The process supports seamless transitions between board members responsible for newsletters, social media, announcements, and website updates-making collaboration more efficient, proactive, and aligned across all channels.

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**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.)**

- Implementing Microsoft Planner as a centralized, checklist-driven system enabled board members to easily track submitted deliverables and identify outstanding tasks.
- We've seen an estimated 50% increase in team productivity, driven by fewer emails requesting clarification and less time spent following up on open items.
  - Accuracy has significantly improved, with a near 100% reduction in communication errors across our social media posts, newsletters, and website.
  - Collaboration between key program owners, Marketing, and Technology has become more streamlined, resulting in better-aligned and more timely event promotions.
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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)**

PURPOSE: To pre-plan events promptly and on time.

OWNERSHIP: The planner should be set up for the entire year by the VP of Marketing. While anyone can contribute to the planner, the VP of Marketing is responsible for ensuring it stays on track and if any communication is any missing information. Be sure to tag all relevant parties for each event in the planner so they receive email reminders if any item still needs to be completed.

GOAL: Work at least one month ahead. For example, events happening in July must be solidified by mid-June. This gives the VP of Technology and Marketing the second half of the month to solidify the remaining duties by June 30th

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INFORMATION GATHERING: Each team must provide all necessary information by the 15th of the preceding month. All communication about each event should be submitted via the Event Submission Template on Microsoft. The VP of Marketing will then transfer this information to the planner. The formatted template ensures that all vital information is captured.

PLANNER DATES: The start and due dates in the planner are associated with when the information is due, not the actual event date. For example, for a July Member's Mingle, the start date would be June 1st, and the due date would be June 15th.

EVENT DATES: The actual event details should be displayed in the "Notes" section of each event.  
Member's Mingle is typically at the beginning of the month, Chapter Program is in the middle, and Momentum Mondays are on the last Monday of the month. The President establishes these dates at the start of the year, but minor changes can occur throughout the year.

MONTHLY EVENTS: We aim to complete 3-4 events each month. Each month will include a Member's Mingle, Monthly Chapter Program, and Momentum Mondays, with a virtual New Member Orientation held quarterly. This information is added to the Monthly Memo email blast on the first of each month, allowing all members to plan and register in advance.

TASK COMPLETION: Each month, once you complete an item on

the checklist, mark it as done. Once all items on the checklist are completed, change the "progress" status to Completed. After completing all events for the month, move them to the end of the list to prepare for the next month's tasks.

FOLLOWING YEAR: Respectfully duplicate "TEMPLATE Event Calendar" and change the name to the next year for the (new) VP of Marketing, making sure everyone gets a fresh organized start. If any updates are needed from what you have learned, please ensure they are implemented for next year's board members.

<b>Is there anything you would do differently?</b>	Continue to on-board new board members to the new process
<b>When did you start working on this effort?</b>	Jun 03, 2024
<b>When did this effort go live?</b>	Jun 30, 2024
<b>Approximately how many hours were spent working on this? Include an estimate of hours spent across all board members and volunteers.</b>	30
<b>What resources did you use? Check all that apply:</b>	Board Members Other: Microsoft Forms and Microsoft Planner
<b>Which board positions were involved in the effort?</b>	Vice President of Marketing, President, Vice President of Technology
<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/18078133233">https://www.formstack.com/admin/download/file/18078133233</a>
<b>How did you become familiar with the Sharing Our Success (SOS) program? Select all that apply:</b>	National Advisors for Chapters (NAC) NAC Area Call Success Series
<b>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.</b>	Yes
<b>email_consent</b>	true