

Sharing Our Success (SOS) Submission Form

Chapter Name: Metro DC

Chapter Membership Size: Large (300+)

Chapter Contact Person: Halyna Hodges

Email Address:

Phone Number:

Chapter Board Position: Director of Operations and Technology

Chapter Website URL: dcatd.org

Submission Title: Board Member Technology Onboarding

What did you do? (a 2-3 sentence summary of your effort): Creating a formal onboarding process for incoming chapter leaders was a strategic goal during the 2020 strategic planning retreat. As part of this effort, the chapter established comprehensive technology onboarding. The goal was to promote a culture of technology adoption across the board. The program helped to ensure that 2021 board members received consistent training. Chapter leaders also gained a deeper understanding of the tools and achieved full productivity within a short period of time.

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

Why did you do it? What chapter needs were addressed? Technology onboarding addressed the following needs:

- Design a structured and self-paced technology onboarding for new board members
- Create a repository of technology user guides available to chapter leaders 24/7
- Help board members to adapt to chapter's tools quickly and efficiently

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.)

- 80% of board members strongly agreed and 20% agreed that "The course has helped prepare me for the board service".
- Board members provided the following comments in onboarding evaluation: "The technology directions were amazing!", "Super organized, adequate amount of documents to review - very relevant, self-paced, deadlines for completion, great details", "The content was so nicely organized and presented in digestible forms and visually appealing".
- The board kicked off the year with a productive strategic planning meeting rather than the usual technology demo.
- Sections of technology user guides were used to onboard 20 chapter volunteers.

What steps did you take to implement this effort? (Remember that other chapter leaders will use this to replicate the effort. Be specific)

The onboarding workgroup created and implemented a formal onboarding process. The team consisted of four board members. The onboarding workgroup created technology user guides for all chapter's tools. The team leveraged Google Classroom, which is free with Google Suite for Nonprofits, to set up a self-paced onboarding course. Each team member reviewed and tested the course. The incoming board members had three weeks to complete the program.

Technology onboarding focused on the following items:

- Securing your board account
- Setting up your Google account
- Setting up your Slack account
- Getting to know Wild Apricot
- Accessing other technology tools (i.e., Zoom, Google Meet, Google Forms, Google Analytics, Doodle Poll, etc.)

Is there anything you would do differently?

Two board members commented that it would be beneficial to add a few short videos to the onboarding.

When did you start working on this effort?

Sep 01, 2020

When did this effort go live?

Dec 10, 2020

Approximately how many hours were spent working on this? Include an estimate of hours spent across all board members and volunteers.

50

What resources did you use? Check all that apply:

Board Members

Which board positions were involved in the effort?

President, President Elect, Director of Communities of Practice, Director of Operations and Technology

Do you have any additional insights to share with other chapters implementing this effort?

In-depth technology onboarding encourages board members to start thinking how they can leverage technology for strategic initiatives within their portfolios from day one. Immediate technology adoption across the board promotes effective communication, accelerates collaboration, and increases engagement among chapter leaders.

One thing to keep in mind is that when functionality of tools changes, user guides will need to be updated. Also, when the chapter adopts additional tools, new resources will need to be created and added to the technology onboarding.

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/11046474215>

additional supporting documents:

<https://www.formstack.com/admin/download/file/11046474216>

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
