

Sharing Our Success (SOS) Submission Form

Chapter Name:	San Diego
Chapter Membership Size:	Small (Less than 100)
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Chapter Board Position:	Dir Finance
Chapter Website URL:	tdsandiego.org
Submission Title:	Onboarding and SOP videos
What did you do? (a 2-3 sentence summary of your effort):	Created short video introductions to each Board role that included both an overview of the position (also usable to market to prospective candidates) and a walk through of key processes, files used, and resources.
Who benefitted from this effort (Target Audience) Check all that apply:	Board Members Other: Members considering applying to the Board
Why did you do it? What chapter needs were addressed?	We wanted to enable faster time to productivity as we noticed the first 3 months of each year were a slow start as new Board members learned their positions. We also noticed a loss in knowledge as key processes and files were not well handed off from old to new Board members, esp. if the role had been vacated mid year. Lastly we wanted prospective Board members to have a warm introduction to our positions, and hear first hand what it was like to fill that position including lessons learned. By recording short (5-10 min) video discussions with current Board members we created a resource that could be used for: <ol style="list-style-type: none">1) Succession planning and marketing of Board roles at annual elections2) An onboarding resource with a knowledge share of key tasks and resources by role3) A way to capture lessons learned and perspectives on making a Board roles a success

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.)

This is the first year we are doing it. Feedback will include reactions from new Board members and eliminating situations where data/resources were "lost" because new Board didn't know where to look or that something existed.

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

1-Announce project to current Board.
2-Meet 1:1 with president elect to record an informal Q&A interview based on standardized questions
3-Allow Board members to work independently to record and 2nd video walking through key files and resources.

Is there anything you would do differently?

Next time, we would focus on capturing insights in real time rather than retroactively. It is always more effective to catch people while they are actively doing the work to translate those real moments into onboarding content, instead of having them reflect later and try to recall details. When board members are in the middle of their duties, that is when the specifics and nuances surface.
Building onboarding from scratch takes time, so using those real-time touchpoints, such as brief check-ins during monthly one-on-ones, would help ensure that what is captured is accurate, relevant, and practical for the next cohort.

When did you start working on this effort? Jul 14, 2025

When did this effort go live? Nov 18, 2025

Approximately how many hours were spent working on this? Include an estimate of hours spent across all board members and volunteers. 20

What resources did you use? Check all that apply: Board Members

Which board positions were involved in the effort? All

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

Videos with key procedures and Board files obviously need additional security/access than the video simply introducing and talking about a role, hence each Board member recorded two parts. There was a fair amount of follow up and "chasing down" of the videos that were created independently, so perhaps try this by just doing half of the Board one year and half the next to minimize project scope.

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/18749695417>

How did you become familiar with Chapter Relations Manager (CRM) the Sharing Our Success (SOS) program? Select all that apply:

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