

Sharing Our Success (SOS) Submission Form

Chapter Name:	Kansas City
Chapter Membership Size:	Medium (101-299)
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Chapter Board Position:	VP Finance
Chapter Website URL:	tdkc.org
Submission Title:	Budgeting with Strawman
What did you do? (a 2-3 sentence summary of your effort):	Helped board members take better decisions around upcoming year's budget based on the activities they are planning.
Who benefitted from this effort (Target Audience) Check all that apply:	Chapter Members Board Members
Why did you do it? What chapter needs were addressed?	Chapter finances are somewhat of a mystery to many board members. Budgeting for the upcoming year used to cause anxiety. As board members didn't know exactly if their plans would have enough money or could not set targets commensurate with the board goals, the budget also used to be a mystery. The finance team often puts it together with a brief approval from the board but without much ownership. The board members were not feeling empowered about making financial decisions, and that, in turn, was holding back some great initiatives/ideas.
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.)	1. Quick turnaround time for the budget 2. Higher involvement of board members 3. Easier financial handover between incumbent and incoming board members 4. The finance team could breathe better! :)

What steps did you take to implement this effort? (Remember that other chapter leaders will use this to replicate the effort. Be specific)	<ol style="list-style-type: none"> 1. Set up a template that was a) familiar to the board members as it followed the monthly financial report format and line item headings, b) easy to follow - linear one-sheet flow from left to right per line item, c) easy to document and discuss - added summary tabs for graphical views, d) Change log - to ensure clarity and traceability of who made what change, and when, 2. Presented the template in the board meeting to gain acceptance (Oct/Nov) 3. Set a to-do in Basecamp (any other calendaring software would do, Outlook, Google, etc.) for each function with a due date of mid-December 4. Followed up with individual members to ensure timely completion 5. This made the actual approval of the budget a simple motion, as everyone had already looked at and discussed the details.
Is there anything you would do differently?	1) Aligning the line items with Quick Books monthly P&L format, 2) Providing the ability to even do a month-by-month budget to account for special events, like an annual conference or ALC expenses
When did you start working on this effort?	Oct 01, 2023
When did this effort go live?	Jan 22, 2024
Approximately how many hours were spent working on this? Include an estimate of hours spent across all board members and volunteers.	4
What resources did you use? Check all that apply:	Board Members ATD Resources
Which board positions were involved in the effort?	All board members with financial responsibilities
Select the ATD resources you used. Select all that apply:	Toolkits
Do you have any additional insights to share with other chapters implementing this effort?	Strawman budgets help kickstart the budgeting activities. Their intuitive structure of starting with the running average of the past three years helps set a solid baseline. The plus/delta columns allow the board members to jot down their thoughts and turn them into approximate dollars. The result is an automatic budget draft with input from each board member.
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/16759874892

How did you become familiar with the ATD Chapter Leaders Conference (ALC)
Sharing Our Success (SOS) program?
Select all that apply:

Would you be willing to apply to present Yes
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.
