

Sharing Our Success (SOS) Submission Form

Chapter Name:	South Carolina
Chapter Membership Size:	Medium (101-299)
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Submission Title:	Let's Roll With It: How A Rolling Board Meeting Agenda Will Maximize Board Effectiveness
What did you do? (a 2-3 sentence summary of your effort):	ATD South Carolina Board of Directors began to maximize a rolling board agenda in 2024 using Google Docs. This approach enhances flexibility and responsiveness, promoting better decision-making and efficient use of time during meetings.
Who benefitted from this effort (Target Audience) Check all that apply:	Board Members Other: Potential Board Members
Why did you do it? What chapter needs were addressed?	In years past, ATD South Carolina had board minute agendas that were created every month either by the President or the Vice-President of Administration. Each month was a different agenda for that particular month. Calendar invitations for board included the agenda. There were opportunities for the board to add their own reports to the agenda and some did add to the agenda but we also had some board members who did not include anything. With a different agenda every month and the fact that some board members were not adding to the agenda, there was an increased administrative workload, potential for redundancy in discussions, and difficulty in keeping track of ongoing issues and decisions. This repetitive process also led to less strategic focus, as we spent more time on routine matters rather than on long-term planning and critical issues.

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 board has all agreed that a rolling agenda is sufficient and easier to manage, track and follow-up on important action items for accountability purposes. A rolling agenda using a shared Google Doc allows:

Accessibility: Google Docs are accessible from anywhere with an internet connection, allowing team members to view and contribute to the agenda in real-time.

Collaboration: Multiple team members can collaborate on the agenda simultaneously, making updates, adding items, or discussing topics directly within the document. This fosters teamwork and ensures everyone's input is captured efficiently.

Version Control: Google Docs automatically tracks changes, allowing users to see who made specific edits and revert to previous versions if needed. This ensures transparency and accountability in the agenda management process.

Flexibility: A rolling agenda can be continuously updated and modified as new topics arise or priorities change. Google Docs allow for easy reorganization of agenda items, enabling teams to adapt quickly to evolving circumstances.

Notifications: Google Docs can be configured to send notifications to team members when changes are made or when they are mentioned in comments. This helps keep everyone informed and engaged with the agenda.

Integration with Other Tools: Google Docs can be integrated with other Google Workspace tools like Google Calendar, Gmail, and Google Meet, streamlining the meeting management process. For example, agenda items can be linked to calendar events or action items can be assigned and tracked using Google Tasks.

Searchability: Google Docs have powerful search capabilities, allowing users to quickly find specific agenda items or discussions within the document. This saves time and ensures that important information is easily retrievable.

Consistency: By using a standardized template for the rolling agenda, teams can ensure consistency in formatting and structure across different meetings. This makes it easier for participants to navigate the agenda and find relevant information.

Links to important documents are also added to the rolling agenda.

What steps did you take to implement this effort? (Remember that other chapter leaders will use this to replicate the effort. Be specific)	The rolling agenda was an idea conceived by me in November 2023 (at that time I was the President-Elect). I put together the document and it was introduced to the 2024 board members during the 2023 board retreat. It was implemented in January 2024 and we began utilizing it to have reviews by the other board members who indicated that it was much more efficient.
Is there anything you would do differently?	We sometimes forget as a board to update our action items from in progress to completed.
When did you start working on this effort?	Nov 19, 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.	7
What resources did you use? Check all that apply:	Board Members Other: Google Docs; Links to important documents such as Robert's Rules of Order
Which board positions were involved in the effort?	I was President-Elect at the time I introduced it to the board.
Do you have any additional insights to share with other chapters implementing this effort?	N/A
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/16396218019
additional supporting documents:	https://www.formstack.com/admin/download/file/16396218022
How did you become familiar with the Sharing Our Success (SOS) program? Select all that apply:	Chapter Leader ATD Chapter Leaders Conference (ALC) National Advisors for Chapters (NAC) NAC Area Call Leader Connection Newsletter (LCN) Chapter Relations Manager (CRM) Chapter Leader Day (CLD) Success Series

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.

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