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| **Chapter Name** | Baton Rouge Chapter |
| **Chapter Number (ex. CH0000)** | CH7121 |
| **Chapter Location (City, State)** | Baton Rouge, LA |
| **Chapter Membership Size** | Medium (101 - 349) |
| **Contact Person for this Submission:** | Missy Korduner |
| **Email Address:** | [treasurer@atdbatonrouge.org](mailto:treasurer@atdbatonrouge.org) |
| **Phone Number:** | (860) - 384 - 2994 |
| **Chapter Board Position:** | Treasurer |
| **Chapter Website URL:** | [http://www.atdbatonrouge.org/](http://enotification.td.org/track/click/30530608/www.atdbatonrouge.org?p=eyJzIjoidGpLNkFYYUdycGVUTWRXTGZDSk1CbGNxeWpnIiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwOlxcXC9cXFwvd3d3LmF0ZGJhdG9ucm91Z2Uub3JnXFxcL1wiLFwiaWRcIjpcImFmYWE3YjZjNGFjYjQzYWQ4MTNjYjhjMWUxYjQ4N2Y0XCIsXCJ1cmxfaWRzXCI6W1wiOWM5YmMwYmIyMjVhYjliZmFmY2ZmMGZjNjNhYWQwNmE2ZjkwNzJiNFwiXX0ifQ) |
| **Submission Title:** | Integrated Payment Processes |
| **Submission Description:** | This submissions outlines the process the Baton Rouge chapter used to streamline and significantly reduce the amount of time needed to manage our chapter finances. Prior to implementing our new system, the preparation of the monthly financials took a significant amount of time and manual coordination as our Paypal payment system did not communicate directly with Wild Apricot or our bank. With the implementation of Paymentech, our new financial processing system, the time to complete monthly financials has been greatly reduced and all financial systems are able to communicate electronically with each other allowing for a simplified and more efficient process of managing our chapter financials and monthly reconciliations. In addition, implementation of Paymentech has allowed members an easier and more efficient way of accessing our services through a one-step log on for registration and payment services, paying invoices, and receiving refunds. |
| **Need(s) Addressed? Please be specific.** | More efficient and timely tracking, reconciling, and recording monthly financials Easier payment and refund options for members Provides a streamlined process for payment reconciliations between Wild Apricot and our bank Reduces the amount of preparation time for the treasurer's responsibilities and simplifies the processes the treasurer needs to complete for the monthly financials Provides easier method of cross training across all board members enabling anyone to utilize the system and step in when the treasurer is unavailable  Members are able to submit payments with a signal sign on to our ATD chapter website Provides members with the opportunity to pay invoices via phone as needed |
| **What is your chapter's mission?** | The mission of the Baton Rouge Chapter of the Association for Talent Development is through exceptional learning and performance, we create a workforce that works better and a community committed to adult professional development. |
| **How does this effort align with your chapter's mission (Please provide specific examples)?** | This effort aligns with our chapter's mission as it provides a more timely and efficient manner of managing our finances as a chapter. It creates a more streamlined and effective process for the chapter treasurer. In addition, it is a simplified process for our members, which directly aligns with our desire to create a workforce that works better. |
| **National ATD's mission is to "empower professionals to develop talent in the workplace". How does this submission align with ATD's mission? Please provide specific examples.** | This submission aligns with ATD's mission as the streamlined payment process provides for a simpler, more direct way for our members to easily access our services and professional development opportunities. In addition, it reduces the amount of time our board members, specifically our treasurer, needs to spend on basic chapter operations, which allows for a stronger focus on serving our members and providing quality professional development experiences. |
| **Target Audience: (Who will benefit/has benefited from this effort?)** | Our members have benefitted in terms of the timeliness of charges and refunds when needed.  The treasurer has most definitely benefitted in terms of financial preparation and the time it takes to complete treasurer responsibilities prior to board meetings. |
| **Costs/Resources Used: (include any details regarding use of resources including monetary, donations, contributions, volunteer hours, people resources, etc. and how you went about getting these resources)** | In terms of volunteer hours, our past President took on coordinating the transition as part of her past President responsibilities. The process from beginning to end was probably about 10 hours in total.  In terms of monetary costs, there is a Paymentech monthly fee using a fee structure per credit card transaction. The minimum Paymentech monthly fee is $25. In addition, there is a $10 monthly fee with ControlScan, which is the interface that allows Paymentech to communicate with Wild Apricot. The monthly fees were essentially already budgeted for with our prior system - Paypal, however the transition to the new system resulted in lower monthly fees for our chapter. |
| **How did you implement: (please give a brief description)** | Over the course of a few years, our chapter reviewed potential payment processing systems to eliminate our need for Paypal. After reviewing different options, the Board decided that Paymentech would be our best resource to complement the work of the treasurer at the time. However, the project was tabled due to other pressing issues of the Board and was picked back up at the end of 2016 when the president was rolling out of her role into the past president role. The contract was reviewed and signed to begin the transition in December of 2016. After the Board reviewed and became familiar with the system and how it worked, the new payment process system was then rolled out to our members in March 2017. |
| **What were the Outcomes: (Please include hard data regarding financial gains, membership increases, target audience satisfaction levels, publicity for the chapter or for the profession, etc.)** | One outcome is the time savings for the treasurer to prepare the monthly financials prior to each board meeting. Estimated time prior to implementation was about 2-3 hours each month on financial statement preparations. This time as reduced to 1 hour or less with the implementation of the new system.  Another outcome is the financial savings in terms of monthly processing fees. In 2016, we spent approximately $640 in Paypal fees for transactions. In 2017, with the last two months estimated, we will spend approximately $625 in Paymentech/Control Scan fees for a savings of $15. The amount of savings was impacted due to our hosting the Regional Conference and monthly fees around registration were increased due to higher traffic. We anticipate that future savings will be higher due to no conference registration fees.  We have also seen an increase in member satisfaction with our payment processes allowing for a one time log in through our website as well as much quicker response time when refunds are needed. |
| **Lessons Learned: (hints and tips for other chapters who may be considering a similar effort)** | If possible, we recommend starting the process so the transition takes place at the start of the calendar year and once the books are closed for the prior financial year (i.e. December).  Each month, pull all invoices in Wild Apricot for the entire month and keep a spreadsheet of unpaid and paid invoices. Wild Apricot exports invoices by creation date not payment date, so it is helpful to be able to refer back to the prior month if the account is not reconciling to see if a prior unpaid invoice was paid in a different month. |
| **Please list the specific ATD chapter resources that helped guide you in the process of completing this best practice (e.g. people, documents, policies, by-laws, etc.):** | Specific chapter resources guiding us through the process were the past President and Treasurer. In terms of documents, we updated the formulas on the monthly document to account for the new process. There were no other resources that were necessary with the implementation and transition process. |
| **Please attach any documents that help support this submission: (additional documents should be sent to Samantha Herman,** [sherman@td.org](mailto:sherman@td.org)**)** | [2017 ATD Budget Template Example.xlsx](http://enotification.td.org/track/click/30530608/forms.td.org?p=eyJzIjoiWXRjWng3cDg3SF8xdEZNbzBBdkhMRjFSVEtJIiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwczpcXFwvXFxcL2Zvcm1zLnRkLm9yZ1xcXFxcXFwvZG93bmxvYWQucGhwP3E9Wm05eWJWOXBaRDB4TVNacFpEMHhORFltWld3OVpXeGxiV1Z1ZEY4eE5nPT1cIixcImlkXCI6XCJhZmFhN2I2YzRhY2I0M2FkODEzY2I4YzFlMWI0ODdmNFwiLFwidXJsX2lkc1wiOltcIjJhN2QwMzI0NGE5ZjBjMjk3MjAxOGZjOTcxYWE3Yjc0ZDkzMjdmYTdcIl19In0) |
| **additional supporting documents:** | [Monthly Transactions - WildApricot 2017 Example.xls](http://enotification.td.org/track/click/30530608/forms.td.org?p=eyJzIjoiTkNwVzNUOXUwaGw0S05haTI1N0s3S09scVRjIiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwczpcXFwvXFxcL2Zvcm1zLnRkLm9yZ1xcXFxcXFwvZG93bmxvYWQucGhwP3E9Wm05eWJWOXBaRDB4TVNacFpEMHhORFltWld3OVpXeGxiV1Z1ZEY4eU1nPT1cIixcImlkXCI6XCJhZmFhN2I2YzRhY2I0M2FkODEzY2I4YzFlMWI0ODdmNFwiLFwidXJsX2lkc1wiOltcIjJhN2QwMzI0NGE5ZjBjMjk3MjAxOGZjOTcxYWE3Yjc0ZDkzMjdmYTdcIl19In0) |
| **How did you become familiar with the Sharing Our Success (SOS) program?** | Saw or heard of SOS from another Chapter Leader |
| **Would you be willing 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**](http://enotification.td.org/track/click/30530608/td.org?p=eyJzIjoiLVM1c0R2cUhkbVBOajF1TjBaR2hzeG1MbTY0IiwidiI6MSwicCI6IntcInVcIjozMDUzMDYwOCxcInZcIjoxLFwidXJsXCI6XCJodHRwOlxcXC9cXFwvdGQub3JnXFxcL2FsY1wiLFwiaWRcIjpcImFmYWE3YjZjNGFjYjQzYWQ4MTNjYjhjMWUxYjQ4N2Y0XCIsXCJ1cmxfaWRzXCI6W1wiNTYzOWQ5MmYyNjI4ZmQ3YjQ3YmRjNDRhNzYxY2IwMDliZWVkYzA3ZVwiXX0ifQ)**. Selected session facilitators receive complimentary registration.** | Yes |