

Sharing Our Success (SOS) Submission Form

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| Chapter Name: | South Florida |
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| Chapter Membership Size: | Medium (101-299) |
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| Chapter Contact Person: | Barb Potter |
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| Phone Number: | |
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| Chapter Board Position: | President |
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| Chapter Website URL: | https://atdsfl.org/ |
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| Submission Title: | President's Virtual Kick-off Strategy Meeting |
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| What did you do? (a 2-3 sentence summary of your effort): | The ATD South Florida chapter has been a high-functioning organization with a strong financial foundation. However, having served on the board since 2020, I observed inconsistencies in governance from term to term and recognized the wealth of untapped talent among our members. To address this, I created opportunities for member champions to step up by expanding VP and director roles, ensuring a strong leadership team before the term even began. I then led a well-structured, highly collaborative, and inclusive virtual kick-off strategy meeting with VPs, Directors, and Committee Chairs to align on goals and set the stage for a successful year-guided by the conviction-"Well begun is half done." |
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| Who benefitted from this effort (Target Audience) Check all that apply: | <input type="checkbox"/> Chapter Members <input type="checkbox"/> Board Members <input type="checkbox"/> Chapter Volunteers <input type="checkbox"/> Chapter Sponsors <input type="checkbox"/> Chapter Partners <input type="checkbox"/> Potential Chapter Members <input type="checkbox"/> Non-Chapter Members <input type="checkbox"/> Consultants <input type="checkbox"/> Other: Local Industry Partners |
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Why did you do it? What chapter needs were addressed?

The board had become lean, leading to last-minute scrambling in planning and reporting, which created tension among members. Additionally, our social media presence lagged behind other chapters, and financial reporting was inconsistent or delayed. Before stepping into the 2024-2025 Presidency, I prioritized strengthening the board by:

- □GOAL 1: Increase the number of Board of Directors (BOD) members-ensuring every VP had a team
- □GOAL 2: Expand committees to champion new chapter goals
- □GOAL 3: Enhance Past-President involvement to leverage their tribal knowledge

I also aligned governance with our chapter's key objectives for the term:

- □Empower Members
- □Include Members and Partners
- □Spotlight Members and Wins

At the heart of these initiatives is a clear focus on our members. Setting presidential goals provided strategic direction and enthusiasm for the term. Our chapter leaders have unlimited ideas-we simply needed to identify the ones we could champion in the upcoming year. The "Empower, Include, and Spotlight" framework made that path clear and actionable.

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.)

Before starting the 2024-2025 Presidency, I prioritized expanding the board to enhance leadership capacity and engagement:

OUTCOME 1: Expanded Board of Directors (BOD) Roles by 40%

- 2023-2024: 22 BOD members (end of term)
- 2024-2025: 31 BOD members

- o Increased VPs: From 8 to 10
- o Expanded Directors: From 14 to 21

OUTCOME 2: Increased Committees by 60%

- 2023-2024: 3 Committees (end of term)
- o Mentorship Program (Director of Mentorship)
- o Champions of Learning (President-Elect)
- o ATDSFL Influencers (Communications)
- 2024-2025: 5 Committees
- o Added: LT Learning SIG (VP of Technology & VP of Professional Development)
- o Added: Consultant Mastermind (Director of Consultant Mastermind)

OUTCOME 3: Increased Past-President Engagement by 60%

- 2023-2024: 5 engaged Past-Presidents (end of term)
- o Sherri Dailing, Anne Solomons, Lisa LeVerrier, Jessica Potter, CPTD, Eivina Muniute-Cobb
- 2024-2025: 8 engaged Past-Presidents
- o Added: Alyssa Chuck, Paul Signorelli, Shannon Whitman
- New Role: Created Director of Past-Presidents to formalize engagement

OUTCOME 4: Set strategy for 2024-2025 Kickoff:

- 100% Executive and Leadership participation
- 20 high impact structured and facilitated activities
- Each VP collaborated with their team to develop strategic initiatives for the term
- Clear roadmap for next steps

By strategically expanding leadership roles and governance structures, we set the foundation for a stronger, more engaged, and future-focused kickoff strategy meeting.

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

The challenge was to engage 31 Board of Directors (BOD) members in a highly accessible and interactive strategy meeting while collaboratively defining our chapter's goals for the year.

Step 1: Establishing the Right Cadence

We needed to shift the timing of annual strategy meetings to occur before the term started, rather than after. However, since the term had already begun without one-and to avoid exceeding the budget-I organized a virtual engagement-based meeting at no cost. This allowed us to reserve funds for an in-person strategy session in the spring.

Step 2: Ensuring Full Leadership Participation

Because we had pre-selected a date during the prior term, we secured attendance from:

- Executive Team: President, President-Elect, and Past-President
- Leadership Team: All 7 VPs
- All Directors were invited and most were able to attend some or all of it

Step 3: Overcoming Virtual Meeting Skepticism

Some members were skeptical about what could be achieved in a virtual setting, but our chapter's talent proved otherwise. To ensure a smooth and engaging experience, I established three key roles for execution:

- Leadership Facilitation - Kim led communication, reflections, and transitions.
- Technical Production - Caren managed all technical aspects.
- Engagement by Design - Barb created and facilitated 20 interactive activities.

Outcome: A High-Impact Virtual Strategy Session

The session demonstrated that virtual strategy planning can be highly effective. Our chapter has incredible ideas, and through 20 engagement activities, including VP team breakouts, we harnessed and aligned these ideas. Each VP collaborated with their team to develop strategic initiatives for the term.

In action, the meeting reflected our chapter's strategic goals:

- Empower VPs to collaborate, make informed decisions, and break down silos.
- Include Directors in key discussions, ensuring clear communication across teams.
- Spotlight wins-first to the BOD, then to the chapter, and ultimately to the community.

This strategic approach set a strong foundation for the year ahead, reinforcing our commitment to collaboration, transparency, and engagement.

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| Is there anything you would do differently? | Nothing at all. It was an enjoyable process filled with insightful "aha" moments-without a single tear shed. |
| When did you start working on this effort? | Jan 01, 2024 |
| When did this effort go live? | Jul 20, 2024 |
| Approximately how many hours were spent working on this? Include an estimate of hours spent across all board members and volunteers. | 54 |
| What resources did you use? Check all that apply: | Volunteers Board Members |
| How many volunteers were you able to recruit? | 5 |
| Which board positions were involved in the effort? | President |
| Do you have any additional insights to share with other chapters implementing this effort? | <p>Total: 54 Hours</p> <ul style="list-style-type: none"> • Development of Deck, Chapter Goals, and Activities: 24 hours (President) • Director Feedback & Revisions: 6 hours (4 members: President, Director of Partnerships, Director of Social Media, Facilitator) • Run of Show & Rehearsals: 6 hours (3 members x 2 rehearsals: President, Facilitator, Technical Producer) • Pre-Event Preparation: 3 hours (1 hour x 3 members: President, Facilitator, Technical Producer) • Event Execution: 9 hours (3 hours x 3 members: President, Facilitator, Technical Producer) • Post-Event Follow-up & Content Upload: 6 hours (2 members: President, Facilitator) |
| How did you become familiar with the Sharing Our Success (SOS) program? Select all that apply: | ATD Chapter Leaders Conference (ALC) National Advisors for Chapters (NAC) NAC Area Call Leader Connection Newsletter (LCN) Chapter Relations Manager (CRM) |

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
