

## Sharing Our Success (SOS) Submission Form

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**Chapter Name:** North Dakota

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**Chapter Membership Size:** Medium (101-299)

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**Chapter Contact Person:** Jodi Stende

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**Chapter Board Position:** President

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**Chapter Website URL:** ndatd.org

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**Submission Title:** Using a SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis to align chapter strategy to CARE

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**What did you do? (a 2-3 sentence summary of your effort):** Conducted a S.W.O.T. analysis during our annual planning retreat to identify areas of weaknesses and opportunities. We then used those findings to create workgroups to determine an actionable and measurable strategy that aligns with CARE. The ideas pushed forward through the workgroups will be approved by the board who will then create a strategy plan for executing the strategy.

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**Who benefitted from this effort (Target Audience) Check all that apply:**

- Chapter Members
- Board Members
- Potential Chapter Members
- Non-Chapter Members

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**Why did you do it? What chapter needs were addressed?** Our chapter had some high-level ideas of where we wanted to go as a chapter, but we didn't have any actionable or measurable plans in place to push us to continue making progress. Conducting the SWOT analysis allowed us to recognize where we are executing well as a chapter and identify areas where we have opportunities to improve. Knowing this allowed us to begin addressing those areas and work to create an execution strategy going forward.

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**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 outcome from this exercise was having a thorough review of the six CARE categories (Administration, Board Development, Communication & Marketing, Finance, Membership, Succession Planning) allowing our chapter to align our Strategic Plan to CARE.

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

- 1) Scheduled annual strategy planning session. We did this virtually using Zoom and set aside 3 hours.
- 2) Explained the purpose and structure of the strategy session during board meeting to get everyone thinking about the Strengths, Weaknesses, Oportunities, and Threats (S.W.O.T.). We asked them to think about those 4 things as it relates to the 6 areas of CARE and their roles.
- 3) Started strategy session by reminding everyone of our Chapter Mission and Vision. Setting those as our guiding principles for how we measure the S.W.O.T. for our chapter.
- 4) Shared with group how each area of CARE is the responsibility of the whole board, even though it might be easy to think that only the VP of Finance is responsible for the Finance CARE component, etc.
- 5) Looked at each of the 6 areas of Care (Administration, Board Development, Finance, Communications & Marketing, Membership, and Succession Planning) and had each board member share what they saw as the S.W.O.T for each of the CARE areas.

Tool 1: We conducted this analysis virtually and used the whiteboard function within Zoom to allow each board member to type their thoughts on the screen.

Tool 2: We used a PowerPoint (template included) that gave each board member a space to put their thoughts so it wasn't chaotic but could be recorded.

- 5) After we went through each CARE component and discussed the S.W.O.T., we went back and identified recurring themes, celebrating what is goin well and recognizing areas where we felt we needed to "up our game".
- 6) After the meeting, we used the themes to create workgroups. For our needs we created 5 workgroups with 3 board members on each. Board members were asked to self identify one or two workgroups they wanted to be involved in. Each workgroup was assigned a leader.
- 7) Workgroups met to discuss ways to address their theme/topic.
- 8) Workgroups present their progress and ideas to the board - making recommendations.
- 9) Schedule follow up strategy session to create measures and milestone dates for the initiatives that will be moving forward.

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**Is there anything you would do differently?**

I would have been more prepared for the need to establish workgroups to take the information learned in the first strategy session and move it forward and set the workgroups up during the initial strategy session. Then I would have broken everyone out into breakout rooms to schedule their 1st meeting.

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**When did you start working on this effort?**

Mar 01, 2021

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**When did this effort go live?**

Mar 31, 2021

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

60

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**What resources did you use? Check all that apply:**

Board Members  
Other: Zoom, PowerPoint, Zoom Whiteboard option.

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**Which board positions were involved in the effort?**

All

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

Conducting the S.W.O.T. analysis is a great way to objectively identify areas of success for a chapter as well as areas that need addressing. The trends and information found during the S.W.O.T. analysis provide the chapter with the starting point for developing a strategic plan to address those areas. It is highly recommended that the strategic plan include measurable outcomes with the action items (including timelines) and people responsible.

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**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)

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**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](http://td.org/alc). Selected session facilitators receive complimentary registration.**

Yes

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