

2017 Annual Report

Annual Goals

- 1) Coordinate 2017 ATD State Conference in October with a goal of 175 participants.

Had a fantastic Oklahoma State Conference. We fell a bit short of the projected 175 participants with 97 total attendance the day of the event, but the feedback was overall extremely positive. One main takeaway was the conference processes developed by chair Linda Jenkins which will assist the conference committee for years to come.

- 2) Increase Power Membership through increased exclusive power member opportunities.

Our chapter had a high of 48% Power Membership in March, 2017. Power members were offered special pricing for the special “Approachable Leadership” learning opportunity in August, and were notated as Power Members with ribbons on their chapter badges.

- 3) Offer at least 3 networking opportunities outside of chapter meetings at no cost to members.

We had a blast with our two new Networking Events held this year at Consumer Affairs in June and The Persimmon Group in September. We learned much about how these organizations provide talent development and enjoyed tours of their facilities and some great food & drink. Plans are to continue more networking events in 2018 with more great companies.

- 4) Create and offer at least one development workshop.

In August, Phil Wilson presented “Approachable Leadership” for our chapter. This was a great half-day workshop that was attended by members and non-members alike.

- 5) Create a scholarship program for students enrolled in a talent development-related educational plan.

A program was developed with structure and added to our chapter’s bylaws.

- 6) Offer opportunities to visit local organizations to see how they manage the talent development function within their organization.

These opportunities were combined with our afore-mentioned Networking events, which created much interest.

Communication/Marketing Strategy –

- 1) Maintain consistent communication with members and contacts through our website, emails, and social media channels as well as announcements during chapter meetings.

- 2) Provide a chapter newsletter each quarter highlighting programs and events, as well as membership information and value of Power Membership.

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- 3) Follow the established timeline for marketing pieces and utilize the automated functions available in Wild Apricot.
- 4) The VP of Marketing and the VP of Digital Media will partner to keep each other informed of all marketing related to the chapter for combined efforts.

Through the leadership of our VP of Marketing, a marketing timeline was created and managed which aided in great information for our members and website visitors, as well as contacts who regularly receive our chapter correspondence. At any given time, our chapter calendar was up to date with meeting information to include upcoming speakers and catering information, as well as special event information such as our Networking events, special learning opportunity and of course, our State Conference web page.

A quarterly electronic newsletter was established, which helped us meet our CARE requirements.

We also decided to move social media marketing under the VP of Marketing umbrella to create a consistent message.

Recruitment/Retention Strategy –

- 1) Continue the quarterly new member lunches.

Our quarterly lunches were unsuccessful in 2017. There are many suggestions as to why this is, but our goal for 2018 is to reestablish the success we saw with these lunches in 2016.

- 2) Create a new volunteer program to provide opportunities for members to get involved and learn more about our chapter.

This did not occur. We are all trying to be more open to member opportunities to serve in any capacity, which ultimately helps us with succession planning.

- 3) Provide opportunities for our chapter to serve the community such as the United Way Day of Caring in September, which builds team/chapter unity.

Our chapter served at Harvard Ave. Baptist Church during the United Way Day of Caring. It was an incredible amount of hard work, from outdoor tree and branch removal to indoor carpet cleaning throughout the church, but our small chapter team was mighty and we made great new friends at the church.

- 4) Continue to frequently inform of the value of membership and participation in the local chapter and international organization.

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Power membership is regularly communicated to our chapter via our website, newsletter, chapter meeting slides, printed information at meetings and in announcements at all of our chapter events and meetings.

Succession Planning Strategy –

- 1) Build from our new volunteer program to identify persons who would be interested in and make good additions to our leadership team.

As mentioned above, a new volunteer program was not established and we are working directly with members to identify areas of interest for service within our chapter and leadership team.

- 2) Encourage current board members to add team members in their area of responsibility.

All team leads have been encouraged to add team members to aid them in their role and to help develop new leaders for our organization. We did reduce the number of positions on the leadership board to 9, which should help us build an effective succession plan for our future.

- 3) Create awareness during chapter meetings and the chapter newsletter that leadership opportunities exist within our chapter.

We express needs to our chapter through our regular communication strategies, announcements and conversations within our chapter.

Special Recognitions

- 100% CARE Achievement for 2016; we have fulfilled and submitted the requirements to earn the Care Membership Star designation for 2017.
- ATD Champion of Learning Award for our Employee Learning Week “Trainer Throwdown” Event
- 2017 Distinguished Service Award - Skip Eller
- 2017 Excellence in People Development Award - Labor Relations Institute, Phil Wilson

Final Comments

2016 was a difficult year for our chapter. Our membership and attendance numbers were indicative of this. After the 2017 board was elected in the fall of 2016, we gathered for a board retreat where we lined out goals and direction for our chapter for the upcoming year. In 2017, we experienced highs and lows in our membership. At our lowest point, we had 71 members. At our highest point we had 104 members. We hit a high of 48% joint membership (Power Members!) in March, and finished the year at 40%.

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We made necessary changes to our by-laws to help us be more efficient and effective as an organization. After more than 25 years, we decided on a chapter dues increase for 2018. Our state conference was very well-received, and we are set up nicely with processes for future conferences.

We saw the need for more intentional connections among members, so we worked diligently to create more opportunities for networking at meetings and events. My personal opinion is this is a significant reason we have seen the growth in our membership numbers. We are finding our talent development tribe, and we are branching out to include more in our industry and beyond.

We have a phenomenal board of directors who worked so hard in their elected roles. I am proud to be associated with them and thank them each for their tireless dedication and commitment to our Tulsa ATD chapter. Without their energy, and hard work, we could never have attained all we did in 2017.

Respectfully submitted,



Lorinda Schrammel
Immediate Past President, ATD-Tulsa Chapter

Leadership – 2017 Board of Directors

Lorinda Schrammel, President
Larry Straining, CPLP, Immediate Past President
Linda Jenkins, President-Elect
Walt Hansmann, CPLP, VP of Administration
Skip Eller, VP of Finance
Kara Schatz, VP of Membership
Lewana Harris, VP of Programming
Cathy Fox, VP of Accommodations
Shelby Morris, VP of Marketing
Mary Parker, VP of SIGs and GIGs
Zac Davis, VP of Digital Media
Greg Kittinger, At-Large Director
Jeremy Smith, At-Large Director
Adam Barrow, At-Large Director
Jim Spradlin, At-Large Director

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Membership – ATD Tulsa and ATD

The ATD Tulsa Chapter began the year with 88 members and ended the year with 104 members, a net increase of 16 members.

As required by the ATD Chapter Operating Requirements (CARE), the chapter must maintain at least 35% joint membership (members of both ATD and the ATD Tulsa Chapter). As of December 31, 2018, our joint membership was 40%. We achieved a peak of 48% joint membership in March.

Financial Performance

Category Description	2017 Budget	2017 Actuals
INCOME		
ATD CHIP	200.00	1,158.31
Meeting Fees	8,500.00	7,299.00
Membership Dues	4,520.00	4,249.00
State Conference Sponsorships	5,349.00	8,250.00
ATD Meeting Sponsorships	0.00	0.00
Special Event-Training	0.00	924.00
Special Event- State Conference	26,840.00	11,882.00
<u>TOTAL INCOME</u>	45,409.00	33,762.31
EXPENSES		
Board Expense		
Board Expenses	5,810.00	4,268.80
Communications Expenses	759.00	884.90
Meeting Expenses	8,527.50	7,570.18
Meeting Expenses	660.00	0.00
Miscellaneous Expenses	29,189.00	22,766.05
<u>TOTAL EXPENSES</u>	44,285.50	35,489.93
<u>OVERALL TOTAL</u>	1,123.50	-1,727.62