

# ATD Tulsa Chapter

## ANNUAL REPORT



2022

[WWW.CHAPTERWEBSITE.COM](http://WWW.CHAPTERWEBSITE.COM)

# 2022 [CHAPTER NAME] BOARD OF DIRECTORS

≡ **CONGRATULATIONS TO  
THE 2023 ATD TULSA  
BOARD OF DIRECTORS!** ≡



**KIM BOGGS**

PRESIDENT



**ANDREW  
ENGELBRECHT**

PRESIDENT-ELECT



**SUNILYN HERTT**

PAST-PRESIDENT



**JENNIFER ROBERSON**

VP OF FINANCE



**CECILIA  
MARTIN-SMITH**

VP OF COMMUNICATIONS



**SCOTT DIXON**

VP OF ACCOMMODATIONS



**TULSA CHAPTER**  
Association for  
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<https://tdtulsa.org/>

# ANNUAL GOALS



Meet Care Plus Certification

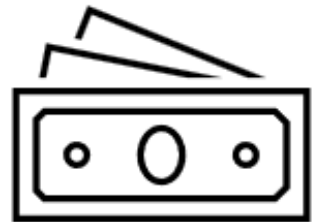


Programming Members Want



Increase Power Membership

Increase Revenue



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# Bylaws Amendments

## Approved by the Membership

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1. Section 3.2 Classes of Membership
2. Sections 3.8 and 3.9 Non-discrimination and Equal Opportunity – to align with EEOC-protected classes
3. Section 5.1 Board of Directors
  - a. Changed VP of Accommodations to VP of Logistics
  - b. Deleted At-Large Directors
4. Section 5.6 Vacancy – Vice Presidents – New process to fill Vice President vacancies.
5. Article VI - Board of Directors Elections
  - a. Updated elections processes and timing to align with completion of elections by September 30 each year
  - b. Section 6.3 Duties and Responsibilities for Elections Committee – provided with new guidance on eligibility criteria for members seeking nomination as President-Elect



# Bylaws Amendments

## Approved by the Membership

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6. Section 7.1 Duties and Responsibilities for President
  - a. Updated to reflect current policies and procedures
  - b. Formatted to be consistent with the format for all board officer positions
7. Section 8.1 Eligibility President-Elect
  - a. Changed eligibility requirements to reference ATD volunteer leadership experience
8. Section 9.2 Vacancy for Immediate Past President Deleted
9. Articles X through XVI – All VP Positions
  - a. Updated to reflect current policies and procedures
  - b. Formatted to be consistent with the format for all board officer positions
10. Article XVII – At-Large Directors Deleted
11. Section 20.1.1 Indemnification Agreement with ATD Added
12. Section 20.3 General Liability Insurance Added
13. Updated to reflect the language and best practices for nonprofit organizations.

# FINANCIAL REPORT

Category Description	2022 Budget	Year-to-Date (YTD)	Difference (Budget - YTD)
<b>INCOME</b>			
ATD ChiP/Membership Fees/Award	\$ 2,500.00	\$ 2,986.29	\$ (486.29)
Meeting Fees	\$ 4,000.00	\$ 3,070.00	\$ 930.00
Membership Dues	\$ 1,250.00	\$ 1,900.00	\$ (650.00)
ATD Meeting Sponsorship	\$ 1,000.00	\$ 250.00	\$ 750.00
ATD Newsletter Sponsorship	\$ 200.00	\$ -	\$ 200.00
Special Event - Training	\$ 3,000.00	\$ -	\$ 3,000.00
Networking Event Sponsorship	\$ 300.00	\$ -	\$ 300.00
Networking Event Fees	\$ 100.00	\$ -	\$ 100.00
Special Event - State Conference	\$ -	\$ -	\$ -
Special Event- State Conference Sponsorships	\$ -	\$ -	\$ -
<b>TOTAL INCOME</b>	<b>\$ 12,350.00</b>	<b>\$ 8,206.29</b>	<b>\$ 4,143.71</b>
<b>EXPENSES</b>			
<b>Board Expense</b>			
National ATD Dues	\$ -	\$ -	\$ -
Retreat	\$ -	\$ -	\$ -
ATD Leader's Conference (ALC)	\$ 1,750.00	\$ 1,000.00	\$ 750.00
Treasurer Expense	\$ 60.00	\$ -	\$ 60.00
Annual Audit	\$ 1,500.00	\$ 937.30	\$ 562.70
<b>TOTAL Board Expense</b>	<b>\$ 3,310.00</b>	<b>\$ 1,937.30</b>	<b>\$ 1,372.70</b>
<b>Communications Expense</b>		\$ -	\$ -
GoDaddy Domains	\$ 169.36	\$ 84.68	\$ 84.68
Go Daddy Email	\$ 700.00	\$ 646.92	\$ 53.08
Wild Apricot Web Site	\$ 1,824.00	\$ 1,824.00	\$ -
SurveyMonkey & Virtual Meeting Subscriptions	\$ 608.00	\$ 539.95	\$ 68.05
PO Box Subscription	\$ 118.00	\$ 156.00	\$ (38.00)
Marketing	\$ -	\$ -	\$ -
<b>TOTAL Communications Expense</b>	<b>\$ 3,419.36</b>	<b>\$ 3,251.55</b>	<b>\$ 167.81</b>
<b>Meeting Expense</b>		\$ -	\$ -
Annual ATD Program Certification Expense	\$ 100.00	\$ 100.00	\$ -
Facility Charge	\$ -	\$ -	\$ -
Meals-Food	\$ -	\$ -	\$ -
ATD December Special Program	\$ 250.00	\$ -	\$ 250.00
Recognition Items	\$ 600.00	\$ 115.99	\$ 484.01
<b>TOTAL Meeting Expense</b>	<b>\$ 950.00</b>	<b>\$ 215.99</b>	<b>\$ 734.01</b>
<b>Membership Expense</b>		\$ -	\$ -
Name Badges	\$ -	\$ -	\$ -
Membership Development/Appreciation	\$ 1,000.00	\$ 1,071.96	\$ (71.96)
New Member Appreciation/Recognition	\$ -	\$ -	\$ -
<b>TOTAL Membership Expense</b>	<b>\$ 1,000.00</b>	<b>\$ 1,071.96</b>	<b>\$ (71.96)</b>

# FINANCIAL REPORT

## ATD Tulsa Chapter Statement of Financial Position as of December 31, 2022

Assets		Liabilities	
Arvest Checking Account	\$ 5,033.34	Accounts Payable	\$ -
Arvest Money Market Account	\$ 15,024.60	Taxes Payable	\$ -
Cash	\$ 73.30		
Accounts Receivable in Wild Apricot*	\$ -	<b>Total Liabilities</b>	<b>\$ -</b>
(Less doubtful accounts)**	\$0.00		
		<b>Net Assets</b>	Unrestricted Net Assets \$ 20,131.24
			Temporarily Restricted Net Assets \$ -
			Permanently Restricted Net Assets \$ -
<b>Total Cash Assets</b>	<b>\$ 20,131.24</b>	<b>Total Net Assets</b>	<b>\$ 20,131.24</b>
<b>Total Assets</b>	<b>\$ 20,131.24</b>	<b>Total Liabilities Plus Net Assets</b>	<b>\$ 20,131.24</b>

Prepared by Jennifer Roberson, 2023 VP Finance on January 4, 2023.

\* Accounts Receivable: None to report.

\*\*Doubtful Accounts are unpaid invoices greater than 90 days old with Unknown Status - None to report.



# Exciting Achievements

1

[ATD Tulsa Chapter, Inc.](#) was excited to announce that we were pre-approved by the [Association for Talent Development \(ATD\)](#) Certification Institute to offer educational programs that can be used towards initial eligibility and recertification of both the Associate Professional in Talent Development (APTD) and Certified Professional in Talent Development (CPTD) credentials!







# Exciting Achievement

2

**atd CAREPLUS**

chapter affiliation requirements



3



4

**atd**

**POWER**

Membership Award

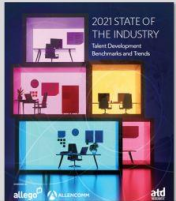


# Programming

# Professional Development

## 2021 STATE OF THE INDUSTRY: TALENT DEVELOPMENT BENCHMARKS AND TRENDS

By ATD Research



Presented by:  
**ATD Tulsa Board of Directors**  
Virtual Event (Zoom)  
Friday, January 21<sup>st</sup>

11:45 AM CST: Welcome/Announcements  
12:00 to 1:00 PM CST: **2021 STATE OF THE INDUSTRY** Presentation  
1:00 to 1:30 PM CST: Networking

**FREE** for ATD Tulsa and COC ATD Members  
**\$10** for Guests

## EFFECTIVE ELEARNING

Presented by

**Kimberly Cofrancesco, M.S.  
& Brian Lanza, M.Ed.**

Director, Learning Solutions & Delivery  
Grant Thornton, LLP  
Sr. Learning Experience Designer  
Lighthouse Learning Solutions, LLP

**Friday, July 22**



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Time

Register

## YOUR LEADERS NEED TO KNOW

Presented by

**Chris Coladonato, CPTD**

Founder  
Connection Catalyst, LLC

**Friday, August 12**



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Time

Register

## IRRESISTIBLE VIRTUAL TRAINING

Presented by

**Kassy LaBorie**

Principal Consultant  
Kassy LaBorie Consulting, LLC

**Wednesday, April 20**



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## MANAGEMENT SKILLS TO CHANGE MANAGEMENT

Presented by

**Katie McLaughlin**

Founder  
McLaughlin Method

**Friday, September 16**



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Time

Register

## SIMPLE, CREDIBLE, & ACTIONABLE

Presented by

**Ken Phillips, CPTD**

CEO  
Phillips Associates

**Friday, May 20**



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Time

Register

## WITH PREDICTIVE QUESTIONS

Presented by

**Ken Phillips**

CEO  
Phillips Associates

**Friday, October 14**



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Talent Development

Time

Register

## GUIDEBOOKS FOR ILT & VILT INSTRUCTION

Presented by

**Pat Michaels**

Chief Learning Mechanic &  
Director of Business Development  
Great Learning Circle

**Friday, June 17**



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Time

Register

## LET'S GET READY TO RUMBLE!

Presented by

**Diane Elkins**

Co-Owner  
Artisan E-Learning

**Friday, November 18**



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Time

Register

# Programming

## Professional Development

Date	Monthly Program Meeting	Attendees
1/21/2022	Insights from the 2021 State of the Industry: Talent Development Benchmarks and Trends by ATD Research	13
2/18/2022	Going Solo? Realities and Rewards of Consulting	13
4/20/2022	Irresistible Virtual Training presented by Kassy LaBorie	26
5/20/2022	Level 3 Evaluations Made Simple, Credible, and Actionable presented by Ken Phillips, CPTD	33
6/17/2022	A Practical Approach to Creating Guidebooks for ILT & VILT Instruction presented by Pat Michaels	23
7/22/2022	7 Fundamentals of Effective eLearning - Kimberly Confrancesco and Brian Lanza	21
8/12/2022	Hybrid Teams: What You and Your Leaders Need to Know presented by Chris Coladonato	9
9/16/2022	Translating your Learning & Talent Management Skills to Change Management Roles and Projects presented by Katie McLaughlin	15
10/14/2022	"Add Muscle to Your Level 1 Evaluations with Predictive Questions" presented by Ken Phillips, CPTD	13
11/18/2022	E-Learning Authoring Tools Showdown: Let's Get Ready to Rumble! presented by Diane Elkins	15



# Programming Special Programing Event

**FACILITATING LIKE A PRO! 3 GUARANTEED  
WAYS TO CREATE MASSIVE PARTICIPANT  
ENGAGEMENT IN LIVE, VIRTUAL TRAINING**

Presented by

***Sardek Love***

CEO

*Sardek Love International*

**Thursday, July 7**

Time

**4:30 to 5:45 PM CT**

Register

**[www.tdtulsa.org](http://www.tdtulsa.org)**

**SPECIAL  
EVENT!**

**atd**

Association for  
Talent Development  
TULSA CHAPTER



# Attendees



**TULSA CHAPTER**  
Association for  
Talent Development

<https://tdtulsa.org/>

# MEMBERSHIP BY THE NUMBERS

## ATD Tulsa Membership Report as of January 1, 2021

<b>Membership Level</b>	<b>#</b>
Power Member (ATD + ATD Tulsa)	49
Associate Member (ATD Tulsa only)	24
Student Power Member (ATD + ATD Tulsa)	1
Student Member (ATD Tulsa only)	1
<b>Total ATD Tulsa Membership</b>	<b>75</b>
<b>Percent Power Member</b>	<b>65%</b>

## ATD Tulsa Membership Report as of December 31, 2021

<b>Membership Level</b>	<b>#</b>
Power Member (ATD + ATD Tulsa)	44
Associate Member (ATD Tulsa only)	34
Student Power Member (ATD + ATD Tulsa)	--
Student Member (ATD Tulsa only)	2
<b>Total ATD Tulsa Membership</b>	<b>80</b>
<b>Percent Power Member</b>	<b>55%</b>



# MEMBERSHIP

## Networking Events

Attendees



### March Member Event

Members FREE • Guests \$10

Let's look to the future of ATD!

Date: Tuesday, March 22

Time: 4:30-5:30 PM

Join us for a virtual Happy Hour.\*

\*Bring your own refreshments.

- Get to know your **2022 Board Members**
- Learn the results of the **2021 Annual Report**
- Hear the information from the **2021 Annual Survey**
- **Share** resources for training and design

Sign up today at [TDTulsa.org](https://tdtulsa.org)



### September 2022 Member Event

Start Your Day With Us *In Person and Outside!*



Date: September 9, 2022

Time: 7:30 am – 9:00 am CDT

Location: Neighborhood Jam  
4830 E 61<sup>st</sup>, Suite 300 (61<sup>st</sup> & Yale)



We will meet outside on the patio and enjoy breakfast treats and informal networking.

Members FREE • Guests \$10

Register at [TDTulsa.org](https://tdtulsa.org)

Attendees



<https://tdtulsa.org/>

# MEMBERSHIP

## Employee Learning Week Activities

**ATD TULSA'S POWERPOINT KARAOKE!**


**FREE for Members!**

Presented by  
**John Chen**  
CEO  
Engaging Virtual Meetings

**Wednesday, December 7**

Time 4:30 to 6:00 PM  
Register [here](#)

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Talent Development  
TULSA CHAPTER



We celebrated  
by sending our  
members a  
sweet treat and  
a fun members  
event!





Thank you for reading our ATD  
Tulsa 2022 Annual Report!

If you have any comments or  
questions, contact Sunilyn Hertt,  
Past President at past-  
president@tdtulsa.org or  
918-345-0373.