



ROCKY MOUNTAIN CHAPTER
Association for
Talent Development

Rocky Mountain Chapter Association for Talent Development

2014 Annual Report

Becky Magnotta
President

2014 Annual Report
Rocky Mountain Chapter
Association for Talent Development
(ATD-RMC)

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January 30, 2014

President's Letter

Dear ATD Rocky Mountain Chapter Members,

The Board of Directors of the ATD Rocky Mountain Chapter produces an annual report for our membership. It is my pleasure to review the highlights of the year with you that include the following events and accomplishments:

- Maintained 100% CORE compliance that is in line with ATD requirements
- ATD Recognition
 - Super Star Chapter – Greater than 50% members also belong to ATD
 - September 2014 ATD Chapter of the Month, a first in our history
 - Recognized for two Share our Success submissions
- Partnerships
 - Our fellow Colorado ATD Chapters to share best practices
 - Colorado International Coach Federation and the Speakers Bureau to network and share best practices
 - Joined the Denver Chamber of Commerce to share the benefits of that organization with our members
- Restarted the Special Interest Group (SIG), Facilitator Connection
- Successfully completed six months ahead of schedule the Brand/Name Change from American Society for Training and Development to Association for Talent Development.

Our Board of Directors is a hardworking, hands-on governing body. Together we pursued new programs and services in order to provide exceptional professional development to our membership. We are building our board bench, with nearly all of the board remaining for 2015, with many of them transitioning to new roles.

Many thanks to Mark Bower, who resigned from our board this year. Mark has been a long time board member, and has filled many roles. In 2014 he was responsible for virtual programs. We will miss Mark's sage advice, and wish him well.

Finally, our Chapter Administrator, Glenda Hines, provides a professional face for our organization with daily interaction with both the membership and board of directors. We thank her for her commitment to quality and customer service.

In accordance with the ATD operating requirements, I submit this Annual Report for the 2014 program year.

Respectfully,

January 30, 2014

Rebecca J. Magnotta, President (2014)
ATD- Rocky Mountain Chapter, January 2015

Board of Directors Report

Becky Magnotta, President

CORE (Chapter Operating Requirements)

In 2014 the Rocky Mountain Chapter complied **100%** with all requirements of the CORE report this year, making this 7 out of 8 years. We are aligned with National ATD chapter operating requirements (CORE) and continued to support the ATD CORE mission: *Empower professionals to develop knowledge & skills successfully*. The Board participates in one retreat at the beginning of each year in which a portion is dedicated to supporting goals set forth by ATD.

2014 Plan

The following goals were addressed during 2014:

- Create a sense of community among members, board and past leaders
- Provide value of membership
- Engage our members to assume more active roles within the organization
- Build strong relationships with other professional groups to provide added value and networking opportunities for our members
- Provide for future leadership through succession planning

Professional Development

This year Robin Doss planned a year of monthly workshops on innovative topics. Our members had many opportunities to network with other area training development professionals. We were also able to bring in four ATD recognized speakers. We reduced our venue and food savings which offset some of the costs of obtaining these speakers.

In addition, Mark Bower managed the delivery of 5 webinars.

Finances

Sid Basu worked intensely to strengthen our balance sheet and ensure our funds were maximized throughout the year. Our net income was just below \$4,000. We efficiently used our expenses and stuck to our budget. Our tax return was also filed properly in a timely manner. This past year we also had our books externally reviewed by an accounting specialist who affirmed the chapter's books and records and provided us with minor recommendations, which were implemented.

Membership

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As of December 31, 2014, our total membership was 216. This is an increase of 8%. In addition, 50% of our members are also members of ATD, well above the 40% minimum requirement.

Chapter Awards and CHIP Revenue

In 2014, the chapter received multiple awards:

- September Chapter of the Month
- Two Share Our Successes recommendations

In addition, we received \$1,777 of CHIP (Chapter Incentive Program) revenue by our members simply entering our CHIP number **CH6046** when they purchase ATD resources or attend ATD trainings. Thank you for remembering your chapter and helping us with this additional revenue.

Sponsorship

Tara Powers, in addition to her role as Vice President of Communication, began to pick up the role of Sponsorship Vice President. Sponsors in 2015 included: Regis University (for our meeting space), and Gene Tognacci.

Communication

Chapter communications was consistent throughout the year. Our email list increased from 996 to 1399 during 2014 and our open rate ranged between 24-26%.

Social Media

In 2014 we stayed in touch with our membership through the use of LinkedIn, Facebook and Twitter.

Technology

The Technology team was kept busy with the chapter's web host, Wild Apricot (WA) upgrade, the rebranding/name change (ATD from ASTD), and the start of implementation of Train-by-Cell

Brand/Name Change Committee

In May 2014, we learned that ASTD was changing its name to ATD. Yvonne Bogard started program managing the changes required for our chapter. We started our work on this program in April/May with 90% completion by June/July, well ahead of the May 2015 deadline.

Other

Yvonne Bogard managed the chapter's first successful CPLP virtual study group serving all Colorado and Wyoming chapters to pass the Knowledge Exam. We

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are happy to say Yvonne earned her CPLP in October 2014. Yvonne is co-authoring a three-part blog series about earning the CPLP.

We also re-launched the facilitator SIG – The Facilitator Connection.

2014 Board of Directors and Chapter Administrator

Board of Directors 2014

Rebecca J. Magnotta, President

Karen Main, Past President

Michele Padilla, President Elect

Sid Basu, Vice President Finance/Treasurer

Robin Doss, Vice President Professional Development

Rachel Drysdale, Vice President Membership

Tara Powers, Vice President Communications

Yvonne Bogard, Vice President Technology

Ted Penberthy, Director Social Media

Sue Fody, Vice President Volunteer Relations

Mark Bowers, Vice President, Virtual Programs

Chapter Administrator:

Glenda Hines

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Professional Development Report

Submitted by Robin Doss, Vice President Professional Development

Over the course of 2014 we tried a few different formats for programs. We had programs with speakers – from local speakers to national and ATD speakers, membership participation programs, and a networking program co-hosted with other local professional organizations. We also hosted a three-part series on assessment with Ken Phillips, who did two virtual sessions and a live session.

The member-sourced Activity Summit and the co-hosted summer networking events were very popular, as was the Drink and Draw and Jim Smith events. The New Member Event provided a warm welcome to new members after the membership drive, spearheaded by VP of Membership, Rachel Drysdale. The Past and Future Leaders Quorum was an innovated approach to learning from past leaders to add to our current chapter and build for the future. Many ideas were gained from this program that our board began to implement. We won two Share Our Success Awards for Drink and Draw and the Past and Future Leaders Quorum.

We tried a few different locations throughout the year. People seemed to prefer more central and DTC locations. Regis University DTC campus proved to be a popular location. We were able to save money through Regis University's hosting sponsorship. We found that hosting at Regis DTC with catering from companies such as Etai's and The Corner Bakery proved to be very cost-effective for a lot of value. We have found that many restaurants we had used in the past are charging minimums for their event spaces – earlier in the week seems to be less expensive, but there is often still a minimum.

We spend a little more and charged less to make the holiday party a great event. La Rumba was a fun and popular location for our holiday party. It provided a lively, spirited atmosphere, a central location, and ample free parking. The recommendation is that we consider this location for holiday parties in the future – Thursday around happy hour is best for this as it is the most cost-effective time to host at this location.

A programming survey was conducted among the membership in August. The survey asked about member preferences for chapter meeting timing and topics. For 2015, we moved chapter meetings to the second Tuesday of the month in order to accommodate third Thursday Chamber of Commerce networking events. We also found that members are most interested in the following topics for 2015: Training & Facilitation Skills, Assessment (covered in September and October of 2014), Engagement, Instructional Design, eLearning Technologies, Organizational Development, The Science of Learning, People Development.

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Event Date	Topic	Presenter	Participants
January 16, 2014	Generational Differences	Nathan Lindsay	25
February 20, 2014	Drink and Draw	Kriss Wittman	35
March 5, 2014	Past and Future Leader's Quorum	Hosted by ATD Board Members	17
March 20, 2014	2 nd Annual Activity Summit	Chapter Members	32
April 17, 2014	JIMpact!	Jim Smith Jr.	44
May 1, 2014	10 Steps to Successful Project Management	Lou Russell	20
June 19, 2014	Collaborating with Frontline Managers	Tim LaMacchio	25
August 21, 2014	Mix & Mingle Networking Event	Hosted with ICF and the Speakers Bureau	51
September 18, 2014	Game-Based Learning: To Play or Not to Play	Carol Clark	28
October 2, 2014	Live session of 3 Part Series Assessment: How to Capture Elusive Level 3 Data – Secrets of Survey Design	Ken Phillips	24
October 22, 2014	New Member Event	Hosted by Board	12
November 20, 2014	Coalition Bargaining & Information Processing	Nathan Lindsay	6
December 11, 2014	Holiday Celebration at La Rumba	n/a	29

January 30, 2014

Virtual Programs Report

Submitted by Mark Bowers, Vice President Virtual Programs

During 2014 we had 5 virtual programs. Topics ranged from leadership, to communication to assessing training. The two webinars with Ken Phillips were sold with one live webinar.

This year, we made these events free to our memberships, which increased the number of participants.

In 2014 Mark Bower resigned from the board. Yvonne Bogard will be the VP of Virtual Programs in 2015.

Event Date	Topic	Presenter	Participants
January 8, 2014	Passing the Torch – Sharing Critical Knowledge with early career employees	Gary Landrum	21
February 19, 2014	Ignite! The 4 Essential Rules for Emerging Leaders	Sal Silvester	19
March 3, 2014	Harvesting the Potential of Online Communications	Patrick Osborne	25
September 11, 2014	Crack the Code of Level 2 Test Question Design	Ken Phillips	22
October 27, 2014	Power up your Level 1 Evaluations	Ken Phillips	22

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Membership Report

Submitted by Rachel Drysdale, Vice President Membership

As of December 31, 2014, we had 216 members, which was up 8% for the year. The increase was due to a membership campaign conducted in September, and also an increase in annual membership renewal rate percentage of 56%, which was up from 48% the previous year.

We ended 2014 with 50% of our members having joint membership. This is the second year in a row we made that percentage. The minimum percentage required for CORE is 40%.

As Rachel Drysdale becomes the VP of Professional Development, Stephanie Johnson will fill the role of VP Membership.

As of December 31, 2014

Individual Memberships:	158
Student Memberships:	9
Corporate Memberships:	<u>49</u>
Total Memberships:	216

(Joint RMC-ATD/ ATD 50%)

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Volunteer Engagement Report

Submitted by Sue Fody, Vice President Volunteer Engagement

Number of volunteers:

On the 2014 list, receiving monthly requests	41	
Unique individuals who covered meeting responsibilities	12	
Volunteered for special projects	5	
Recruited from the outside for board positions	2	Amy Bethel, Nathan Glover
Transitioned from volunteers to the board	2	Robin Doss, Stephanie Johnson

2014 Summary Report for the Volunteer Committee

RMC's volunteer list contains of 41 individuals who have offered to help the chapter. They receive monthly emails soliciting help for chapter meetings.

Occasionally they will also receive special requests for ad hoc projects. Out of these requests, 12 individuals have donated their time to the chapter during monthly meetings. Two of these volunteers, Robin and Stephanie, have transitioned to volunteer positions on the board: President Elect and VP of Membership.

We have had one special project where 5 volunteers were recruited to help with a mail/phone project.

The volunteer committee has recruited two individuals from the outside to fulfill open board positions and have subsequently become members. Amy, who has a marketing background, was recruited to fill the position of VP Marketing. Nathan, who does websites, training and marketing, is now our Webmaster.

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Sponsorship Report

Submitted by Tara Powers, Vice President Communications

In addition to her role as Vice President of Communication, Tara began to pick up the role of Sponsorship Vice President.

Sponsors in 2015 included: Regis University (for our meeting space), Gene Tognacci, Cornerstone on Demand, University of the Rockies and Colorado State University.

Sponsorships brought in approximately \$1000 of revenue to the chapter in 2014.

Tara will be transitioning to this role in 2015.

Technology Report

Submitted by Yvonne Bogard, Vice President Technology

This year has been very exciting and very busy. First, the chapter's web host, Wild Apricot (WA) upgraded to a major version which required a lot of rework to most of our webpages. This was a substantial undertaking while learning a very different web design tool, version 5.0.

Second, the rebranding efforts were considerable. As part of the rebranding efforts, email accounts were established for each front-facing role such as president@atdrmc.org, programs@atdrmc.org, membership@atdrmc.org, and volunteer@atdrmc.org. This approach allows for reduced maintenance as board members change roles or move on in the future. For more information, see rebranding section below.

Lastly, after attending the All Leaders Conference in October, Yvonne moved forward with the implementation of Train-by-Cell offered for free, courtesy of ATD national. This tool quickly and easily delivers our website information on mobile devices. We are currently in testing prior to releasing to the board later this month.

This has been a very productive year and Yvonne is passing the baton to Nathan Glover, our new VP of Technology as she moves on to the role of VP of Virtual Programs.

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Communication Report

Submitted by Tara Powers, Vice President, Communications

Chapter communication was consistent throughout the year with the weekly emails focused on upcoming chapter programs and events, and the monthly newsletter focused on the President's Message, special announcements, opportunities for learning, articles from our sponsors, and an article from the Communication VP, Tara Powers.

Our email list increased from 996 to 1399 during 2014 and our open rate ranged between 24-26%.

At the end of 2014, I transitioned to VP of Sponsorship, and Amy Bethel will be filling this role in 2015.

Social Media Report

Submitted by Ted Penberthy, Director, Social Media

In 2014 we stayed in touch with our members using social media. This included discussion groups, and also promoting our virtual and live events. We plan to do more of this in 2015. Below is a list of the different ways our members can stay in touch with us.

- LinkedIn group – ATD-RMC Rocky Mountain Chapter
- Facebook – www.facebook.com/atdrmc
- Twitter - @atdrmc

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Brand/Name Change Report

Submitted by Yvonne Bogard, Vice President, Technology

As our Chapter Brand Ambassador, Yvonne Bogard coordinated and managed the rebranding efforts. We used the Chapter Branding Implementation Checklist and assigned board members to each of their respective areas. For example, the Presidents (present and future) and Treasurer were responsible for all financial and legal governance. I focused on making the rebranding changes to the chapter website, <http://www.atdrmc.org> and any chapter marketing materials/brochures.

The social media rebranding efforts were conducted with the help of Ted Penberthy, the new Director for Social Media. Ted focused on Twitter, Facebook, and YouTube while I focused on LinkedIn.

Working with both Wild Apricot and godaddy, we established a new domain name for the chapter. This was a considerable learning curve but fun to learn what goes on in the background.

Our VP of Communications, Tara Powers implemented the rebranding changes for chapter email blasts and eNewsletters.

All major changes were made by June/July 2014 with additional changes made as logos and materials from national were made available. For example, the Power Member logos and marketing materials have been added after the initial June completion timeline.

After discussions with Wendy Leedy, we believe we were the first chapter to complete our Brand/Name Change, six months ahead of schedule.

Other Areas of Focus

CPLP Virtual Study Group

Yvonne Bogard managed the chapter's first successful CPLP virtual study group serving all Colorado and Wyoming chapters to pass the Knowledge Exam. The synergy amongst the members was astonishing with each member playing a vital role in the success of each member. All members passed the Knowledge Exam. The study group disbanded as we all had various life and work demands. However, one member passed the Work Product immediately following the Knowledge Exam, and the remaining passed the following year. We are happy to say Yvonne earned her CPLP in October 2014.

As a result of earning the CPLP, Yvonne was contacted by Jenna Smith, Marketing Manager for ATD to write about the journey to earning the CPLP. With a member of the original study group from Pikes Peak Chapter Yvonne is co-authoring a three-part blog series on the path of earning the CPLP.

Yvonne is also working with Jennifer Rogers, Past President of the Piedmont Chapter, to pilot a Mentoring Program and establish a robust CPLP program for their respective chapters. They anticipate recommending a new role be added to the board, Director of CPLP Study Groups.

Special Interest Groups (SIGs)

In 2014 we re-launched the facilitator SIG – The Facilitator Connection. This group meets monthly, and is a great enhancement to our programs.

We also attempted to start a Student/Young Professionals SIG, which we will keep working on in 2015.

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2014 Income and Expense

ATD-RMC	
Profit and Loss	
January - December 2014	
	TOTAL
Income	
4000 Membership Dues	26,084.86
4000.1 Pof2 Paid to National	-10,177.96
4050 Program Income	7,435.19
4400 Chapter Income	
4300 Sponsors	670.00
4410 CHIPS	1,776.64
4490 Interest Inc	4.16
4500 Other Award	0.00
Total 4400 Chapter Income	\$ 2,450.80
Total Income	\$ 25,792.89
Gross Profit	\$ 25,792.89
Expenses	
5100 Prog Exp	577.22
5110 Facility and Food/Beverage	4,299.19
5110.3 Caterer	198.75
5114 Program Gifts	19.98
5115 Speaker Pay	3,528.10
5116 Speaker Hotel, Food, Taxi, etc	339.05
5118 Program - Misc/Other	266.55
5119 Technology - Programs	480.00
5415.01 Printing-Programs	3.00
Total 5100 Prog Exp	\$ 9,711.84
5400 Other Exp	
5200 Technology Expense	596.33
5401.01 Leadership Conf	2,482.46
5401.02 National Memberships	952.00
5401.03 BOD Meet'g/Recog.	1,537.01
5402.01 Software/Subscrp Fees	351.56
5402.02 Membership	199.60
5402.03 Communications	265.88
5402.04 Marketing	566.07
5403 Tax Return Preparation	0.00
5410 Postage	51.85
5415 Printing	50.59
5420 Supplies	15.04
5430 Insurance	1,120.00
5441 Permits and Fees	25.00
5490 Bank/CC fees	1,600.96
Total 5400 Other Exp	\$ 9,814.35
5402.06 Dues & Subscriptions	595.00
Total Expenses	\$ 20,121.19
Net Operating Income	\$ 5,671.70
Other Expenses	
5435 Management Fee	1,709.16
Total Other Expenses	\$ 1,709.16
Net Other Income	-\$ 1,709.16
Net Income	\$ 3,962.54