



**ROCKY MOUNTAIN CHAPTER**  
**Association for**  
**Talent Development**

December 31, 2018

Rocky Mountain Chapter  
Association for Talent Development  
2018 Annual Report

Jean Eckhoff  
President

**Table of Contents**

# ATD-RMC 2018 Annual Report

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December 31, 2018

President's Letter	3
Board of Directors Report	4
2018 Board of Directors and Chapter Administrator	6
Programming Report	8
Membership Report	11
Community Engagement Report	12
Sponsorship Report	12
Technology Report	14
Communication & Social Media Report	15
Finance Report	15
CPLP Virtual Study Group Report	18
Other Areas of Focus	19
ICE Volunteer Coordination	19

# ATD-RMC 2018 Annual Report

December 31, 2018

## 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% CARE compliance that is in line with ATD requirements
- ATD Recognition
  - Super Star Chapter
    - Awarded for meeting all CARE requirements and having more than 50% of our members be joint members with ATD National.
- Partnerships
  - Initiated the Coalition of Colorado Organizations (COCO). COCO is the **Coalition of Colorado Organizations** for Human Resources professionals in Colorado. COCO's mission to bring together and align all associations across the state of Colorado who support the Talent functions. We exist to serve the profession and build a community that deepens the professional networks across the front range providing career pathways within the Denver community for our profession and the professionals that we serve. (See print marketing material in Appendix.) Organizations joining ATDRMC are:
    - Boulder Area Human Resources Association
    - Colorado Healthcare Association for Human Resources Management
    - Hospitality Human Resources Association
    - International Coaching Federation – Colorado
    - International Foundation of Employee Benefits
    - Mile High SHRM (Society for Human Resources Management)
    - National Speakers Association
    - Organizational Development Network – Greater Denver Region
    - Rocky Mountain Human Resources People and Strategy
    - Rocky Mountain Relocation Council
    - Rocky Mountain Total Rewards Association
  - Initiated a partnership with TRACOM Group – the Social Intelligence Company®. In partnership with TRACOM, ATDRMC is offering 4 workshops related to building an individual's social intelligence in business. These workshops provide hands-on sessions on introducing the value of social intelligence in business, agility, resilience and behavioral intelligence. Participants will build their personal improvement plan during these workshops as a take-away that they can use in their own organizations.

Though we have had quite a few changes to our board during 2018, the changes have brought many exciting and new ideas and processes to our chapter due to the diligence of our new and existing board members. Our board is truly a hands-on governing body and collaborated excellently in pursuing new programs and services in order to provide exceptional professional development to our membership. We look forward to everything our new 2019 board will create. Lastly, our Chapter Administrator, Ann Baus, continues to provide 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.

We've also enjoyed the increased volunteer efforts of many chapter members this year, who have stepped up in various ways to support long-term and short-term projects, as well as our events. We are so grateful to all who volunteer to make our chapter what it is.

In accordance with the ATD operating requirements, I submit this Annual Report for the 2018 program year.

Respectfully,  
Jean Eckhoff, President  
ATD-Rocky Mountain Chapter

# ATD-RMC 2018 Annual Report

December 31, 2018

## Board of Directors Report

Jean Eckhoff, President

### **CARE** (Chapter Affiliation Requirements) SEP

In 2018 the Rocky Mountain Chapter complied **100%** with all requirements of the CARE report this year, making this 10 out of 10 years.

ATD Chapter Affiliation Requirements (CARE) are a set of performance guidelines designed to help chapters deliver consistent benefits to members. CARE consists of elements in five key areas that are necessary for running a chapter like a business:

- administration
- financial
- membership
- professional development
- communication

### **2018 Plan**

The 2018 vision was to set SMART goals for membership engagement and processes for measuring our success. Our goal was to have 33% of our members engaged i.e. attend at least 4 events during the year. We aimed to engage our current and future members by offering robust programming throughout the year and driving a higher NPS score.

Our initiatives in programming included setting a specific date and time for our chapter meetings and providing quality networking time for prospective and current members. In addition, we collaborated strongly with our new Executive Advisory Committee to improve our programming, membership efforts, and CPLP program.

Social media was heavily utilized to inform prospective and current members of chapter meetings, and thought-provoking articles. We changed our monthly newsletter to a weekly email in order to provide quick, easy-to-digest, relevant information to our members.

To measure our goals, we created a scorecard that tracked our chapter membership changes and attendance, finances, social media and CARE requirements.

Our finance goals were to review all systems and processes in order to cut costs where we could. In that realm, our VP of Technology and VP of Finance were successful. We initiated using Google as a platform for all our communication needs at a non-profit rate, reduced our banking fees, and eliminated redundant software platforms. All these tasks resulted in lower costs to our chapter.

We continued with the goals of being 100% CARE compliant, be award-winning, and to attract, engage and support learning professionals in the Denver area.

### **Programming**

This year Ivelise Zambrano-Herrera began the year by planning monthly chapter meetings. We focused our programming on member requests and the ATD Competency model and featured a spring leadership series. One of the most innovative programs was in conjunction with a new professional development group started in the Silicon Valley – Culture LabX – and a local thought leader in effective workplace communications – Four Winds Interactive.

We hosted 15 chapter events this year with an average attendance rate of 19 including both members and non-members. Our highest attended event was our Denver authors panel with an outstanding turnout of 35 attendees – both members and non-members. Our new member meet-and-greets were a big hit with an average attendance of 19 as well.

### **Finances**

Lisa Vallad and Elaine Moore issued monthly financial reports, filed our 2018 tax return, sought outside counsel for a financial audit, and provided suggestions to increase our revenue and maintain a healthy operating and savings accounts. In 2018, ATD RMC also transitioned to an all-inclusive membership of \$125 per member, which then included entry into

# ATD-RMC 2018 Annual Report

December 31, 2018

all chapter events, from a membership fee of \$84 per member, with a \$20 entry fee to each chapter event. Some highlights for the year:

- Our cash balance year over year grew from approximately \$32,000 to \$34,000, a 7% increase.
- We had a net income of approximately \$960 for the year ended December 31, 2018.
- Anticipated revenues were not as high as budgeted; approximately \$13,720 actual compared to approximately \$19,260 budgeted.
- However, expenses were also lower than budgeted, approximately \$18,100 actual compared to approximately \$23,900 budgeted.

## Membership

As of December 31, 2018, our total membership was 182. In addition, 57% of our members are also members of ATD National, well above the 35% minimum requirement. We had a focus on engaging members and attracting new members to provide extra opportunities for current members to network with fellow members and talent development professionals. We have also sought to engage members through increased opportunities to get involved with the chapter.

## Chapter Awards

In 2018, the chapter received one major award: The Chapter Super Star Award. The Chapter Super Star Award awarded \$3,000 plus an entrance fee to the ICE conference in San Diego for 100% CARE Compliance along with more than 50% joint membership between ATD-RMC and ATD National.

## CHIP Revenue

In 2017, our CHIP revenue was \$6,193. In 2018, our total CHIP revenue was \$2,191.08 which was a decline of about 282%. 2019 plans should be focused on increasing our marketing efforts to our members about using our CHIP number CH6046 when purchasing ATD resources or attending ATD trainings/conferences.

Thank you for remembering your chapter and helping us with this additional revenue. It has allowed us to increase programming and offer more discounts, incentives, and gifts to our membership.

## Community Engagement

Our VP of Community Engagement, Sue Fody, took on the task of being the point person for our newly formed Executive Advisory Council. She planned and facilitated each quarterly meeting – with a special focus for each meeting. In March 2018 the EAC meeting was focused on innovative programming topics. In June 2018 we focused on processes to increase membership through connecting with lapsing members. In September 2018, our VP of Certifications brainstormed with the EAC on ways we can market our CPLP Virtual Study program to Denver corporations. In December we discussed succession planning. Sue Fody presented the topic of engaging your community through an Executive Advisory Council at the All Leaders Conference in Washington DC in October 2018.

## Sponsorship

One of our goals this year was to bring a VP of Sponsorships on to our board and we were very pleased that Eric Nemechek took this position on at the beginning of August. His efforts has brought great success: 2 of our chapter meetings were sponsored by local Denver companies, has secured sponsorships from two local organizations and has already secured sponsorships for two of our 2019 chapter meetings.

## Communication & Social Media

This year we transitioned to a new VP of Communications. Lisa Gilliard's efforts resulted in a great improvement in the way we communicate with our members. Instead of a monthly newsletter with an overwhelming amount of information, we initiated a weekly email blast with each week focusing on a different topic: CPLP, volunteers, events and news tidbits. Our chapter communications were consistent throughout the year using HootSuite to make chapter promotions and communications reach a wider audience. We have also continued to stay in touch with our membership through the use of LinkedIn, Facebook and Twitter and have used these social media platforms for more event and program marketing.

## Technology

Our VP of Technology, Ginger Nichols, was instrumental in reducing our chapter administrative costs, improving how the board communicates with each other and keeping chapter documents organized through the use of Google Suite for non-profit organizations. With her efforts in reviewing systems and processes, along with the VP of Finance, we reduced our banking fees and costs for software platforms. Our Google Suite is now organized for maximum efficiency for all our board

# ATD-RMC 2018 Annual Report

---

December 31, 2018

members. Ginger also took on the enormous task of cleaning up our database of members so that we can report accurate figures.

## **CPLP Virtual Study Group**

Our VP of Certifications, Shannon Wzientek, continued to manage the chapter's successful CPLP virtual study group serving all Colorado and Wyoming chapters to pass the Knowledge Exam. ATDRMC is now collaborating with several chapters across the United States to offer this innovative study program to chapter members around the globe. Our plan for 2019 is to have other chapters host the study groups while ATDRMC continues to do the administrative operations of the program.

## **2018 Board of Directors and Chapter Administrator**

Jean Eckhoff

President

# ATD-RMC 2018 Annual Report

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## December 31, 2018

Lisa Vallad	President Elect	(Jul – Dec)
	VP Finance	(Jan – Jul)
Yvonne Bogard	Past President	
Sue Fody	VP Community Engagement	
Lisa Gilliard	VP Communications	
Shawn Evans	VP Membership	(Jan – Jul)
Jeannie Clinkenbeard	VP Membership	(Aug – Dec)
Ivelise Zambrano-Herrera	VP Programming	(Jan – Jun)
Onna O'Meara	VP Programming	(Jul – Dec)
Marla Whipple	VP Programming	(Jul – Dec)
Eric Nemecek	VP Sponsorships	(Aug – Dec)
Ginger Nichols	VP Technology	
Ann Baus	Chapter Administrator	



# ATD-RMC 2018 Annual Report

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December 31, 2018

## Programming Report

Submitted by Onna O'Meara and Marla Whipple, Co-VPs of Programming

2018 saw ATDRMC again deliver an impactful and well-attended professional development line up with a minimum of one event every month of the year. We hosted a wide variety of speakers, held several productive networking events and hosted new member orientation/networking get-togethers.

In July, Onna O'Meara and Marla Whipple took over the VP of Programming role from the previous vice president, Ivelise Zambrano-Herrera. In 2018 ATDRMC delivered programs on topics ranging from leadership, coaching, learning technologies, change management, to training delivery. We selected our topics based on the 2017 annual survey on members' areas of professional development interest as well as the ATD competency model. Our highest-attended programs outside of our networking events were on training delivery and assessments, each with greater than 24 attendees.

Our two networking events (one in July and one in December) validated that our members look to ATDRMC as a preferred venue to make professional connections and expand their network. As a means to drive our increased focus on new members, we also held several new member events resulting in an increase in membership and requests to volunteer in our chapter. Several new members have been able to use the connections they made at ATDRMC as referrals when pursuing new employment opportunities.

# ATD-RMC 2018 Annual Report

December 31, 2018

Submitted by Onna O'Meara, VP Programming & Marla Whipple, VP Programming

## Summary/Highlights/Initiatives

Highlights of the year included the following:

- Chapter meetings moved to a consistent time and day (the first Wednesday of every month)
- Chapter meeting expenses reduced drastically
- Chapter meetings have consistently over 20 attendees

Date	Topic	Speaker	ATD Competency	Location	Non-Member Income	Cost	Registered	Attended
Jan 17	The Authentic Leader in You	Diane Zile	Coaching/ Performance Improvement	Comedy Works	\$310	\$589	26	26
Feb 20	The Leader as Innovator	Jeannie Clinkenbeard	Performance Improvement/Coaching/ Change Management	Blue Moon	\$170	\$496	24	19
Mar 15	Speak Like a Broadcaster and Persuade Like a CEO	Liz Peterson	Coaching/ Training Delivery	Blue Bonnet Cafe	\$50	\$494	11	10
Mar 28	Using LinkedIn to Enhance Your Face to Face Networking	Joyce Feustel	Networking	The ART Hotel	\$80	\$1,060	24	13
Apr 17	Approach Leadership Like a Coach	Dean Savoca	Coaching/ Change Management	Comedy Works	\$90	\$662	13	10
May 23	Using Technology to Build an Amazing Culture	David Levin	Performance Improvement/Change Management/Integrated Talent Management	Four Winds Interactive	\$70	\$0	13	8
Jun 20	Learning Technologies Special Interest Group Show and Tell	Panel	Learning Technologies	Daniels Fund	\$0	\$0	20	13
Jul 18	Network Like a Pro!	Alyce Blum	Networking	Blue Moon	\$130	\$340	24	19
Aug 29	Terrific Training Tips from Top Training Experts	Denver Author Panel	Training Delivery	Hacienda	\$220	\$0	37	35
Sep 5	The Mentor Shift: Coaching Others to Utilize Mentoring as a Development Tool	Lori Bachman	Coaching /Managing Learning Programs	Blue Moon	\$30	\$317	24	20
Oct 3	Instructional Design: Exploring Tensions and Metaphors	Brent Wilson	Instructional Design	Hacienda	\$110	\$375	30	24

# ATD-RMC 2018 Annual Report

December 31, 2018

Nov 7	The Future of Assessments - Growing Self-Awareness in a World of Information Overload	Assessment Experts Panel	Managing Learn Programs	Bar Louie	\$30	\$203	33	24
Dec 5	Holiday Celebration and Networking	N/A	Networking	Briar Common	\$110	\$116	31	24

We again conducted the member survey in 2018 to gauge our members' areas of interest and will use that information to guide our 2019 programming lineup. In 2019, we will look for new interesting ways to engage our members including workshops, road shows and other formats that provide variety.

In 2018, our monthly programs were held at various locations throughout the Denver metro area. We are continuing to identify meeting space for our monthly programs. In 2019, we will continue to partner with the VP of Sponsorships to obtain sponsors for our monthly chapter events in order to reduce costs at our chapter meetings, the TRACOM Social Intelligence workshops and other ATDRMC events.

# ATD-RMC 2018 Annual Report

December 31, 2018

## Membership Report

Submitted by Jeannie Clinkenbeard, VP of Membership

As 2018 comes to a close, the Rocky Mountain Chapter has a total of 184 members. Officially, we are down 8 members over last year; however, we consider this to be a relatively nominal decrease.

<b>2018 Data</b>	
Active Members 1/1/18	191
Lapsed but not renewed	-70
New Members	63
Active Members 12/31/18	184

Jeannie Clinkenbeard assumed the role of Vice President of Membership from Shawn Evans mid-way through 2018. She has been able to actively engage our members through partnering with the Vice Presidents of Programming to provide compelling monthly programs and opportunities to participate in the chapter, which is a testament to the value that we offer our members. Additionally, we increased our membership by offering new membership discounts at our new member meet and greets throughout 2018. We will continue with the strategy in 2019 to increase membership.

Jeannie has worked diligently to increase our membership through the following efforts:

- Initiating a 'Member Spotlight'. Jeannie publicly recognizes one of our ATDRMC members at our chapter meetings which helps build connections among our members.
- One month prior to their membership renewal, Jeannie sends a personal note to the ATDRMC member.
- Initiating a 'new member' welcome gift at our chapter meetings. Each person who registers as a new member receives a branded ATDRMC gift at the first meeting they attend.
- Every chapter meeting has printed material on membership and power membership benefits.
- Power membership is highlighted at the beginning of every chapter meeting.
- For lapsed memberships, we are initiating a 'We-Miss-You' campaign. Postcards will be sent to lapsed members with a code to join one of our 2019 chapter meetings at no cost. Our goal is to encourage our lapsed members to return to ATDRMC as a member.

**We ended 2018 with 57% our members having joint membership in both the Rocky Mountain Chapter and ATD National. This is an increase over last year and we continue to increase our joint membership year over year.**

# ATD-RMC 2018 Annual Report

December 31, 2018

## Community Engagement Report

Submitted by Sue Fody, Vice President Volunteer Engagement

Volunteer engagement in our ATDRMC chapter was phenomenal in 2018. Though we had some shifting as people left their board positions, there were no time gaps between someone leaving their role and a new volunteer being onboarded. The one board position that had been vacant was filled by August 1, 2018. We continue to have one director position open. We also decided as a board to change the Vice President of Certifications position to a Director position; this allowed the former vice president to reduce her time commitment and still continue to be engaged with our board of directors - a winning solution for all involved.

During 2018, we created 3 special interest groups to provide our members a further venue to network and exchange ideas with like-minded professionals: Instructional Design, Learning Technologies, and Consultants. These have all been well attended and ATDRMC members have come forward to volunteer as leaders of these groups.

### Statistics

Volunteers engaged with ATDRMC	14
Board positions (12)	All filled
Directors (2)	
• eCommunications and Certifications	Filled
• Director of Volunteers	Vacant

### **2018 Summary Report for the Volunteer Committee**

Throughout 2018, we continually recruited for volunteers at the quarterly New Member Events and chapter meetings by personally speaking to new and existing members. In December 2018, we received three requests to place volunteers. They have been connected with associated board members. There is a vacancy in the Director of Volunteer position and the VP of Community Engagement continues to fill this role until a replacement is found.

### **Executive Advisory Council**

In 2018 the Executive Advisory Council (EAC) was in its second year and held quarterly meetings. The EAC provides outside expertise to the chapter to help direct strategy, focusing on techniques to increase member engagement. The areas of focus at each meeting gave the council opportunity to provide perspective in the areas of Membership, CPLP, and the ATDRMC Consultant Directory. Advice on membership helped shape the contents of the membership survey. The CPLP presentation was focused outward to educate the council members on the value of considering CPLP and APTD certified candidates for hire. The Consultant Directory presentation elicited much feedback on how consultants can be found and hired in the community. The EAC was founded in 2017 with a 2-year term length. At the last quarterly meeting of 2018, succession planning was discussed. ATDRMC is fortunate in that 8 of the original members will remain on our EAC. Our plan is to begin taking nominations to fill the 3 vacancies.

### **Consultant Directory**

The Consultant Directory is an idea adding value to the members who are small business consultants. It is targeting businesses with 5 or fewer employees. At the end of 2018 we had 23 consultants on the Consultant Directory. The webpage was built in the first half of 2018, and is now a Special Interest Group (SIG) of the chapter. We have held monthly meetings since September 2018. The elements of the group were presented to the Executive Advisory Council (EAC), which gave feedback to influence the direction of the group. The Directory is growing by 2 – 3 consultants every month as awareness spreads.

### **Student Contingency**

Focusing on generating student members was a new initiative for the chapter in 2018. We had a volunteer who agreed to be the Director of Student Memberships. Our efforts were not productive and we decided to eliminate energy directed towards this initiative at this time.

## Sponsorship Report

Submitted by Eric Nemechek, VP of Sponsorships

# ATD-RMC 2018 Annual Report

---

December 31, 2018

Eric Nemechek assumed the role of VP of Sponsorships in August of 2018. One of his initiatives was to reach out to local area Denver businesses with the following purposes:

- Increase awareness of ATDRMC and the benefits organizations will receive with employee memberships
- Provide 2 options of sponsorships in order to build awareness in the learning and development community of that organization's offerings
  - Yearly sponsorship of ATDRMC: provides the organization several opportunities during the year at chapter meetings to promote their product or service
  - Chapter meeting sponsorship: provides the organization an opportunity at one chapter meeting to promote their business or service

Eric successfully sponsored two of our chapter meetings in August and December by local Denver companies: Meridian Knowledge Solutions and Judge Learning Solutions, respectively.

We have already secured sponsorships for two of our 2019 meetings and have also updated our sponsorship packet and sponsorship information on the website.

We look forward to growing in this area in 2019.

# ATD-RMC 2018 Annual Report

December 31, 2018

## Technology Report

Submitted by Ginger Nichols, VP of Technology

Our VP of Technology is responsible for creating, updating and ensuring our website is functioning for both members and our board of directors. She also provides analytical data on website traffic, membership and events and provides technical assistance to members, non-members and our board of directors for our website, Google Suite, Wild Apricot and PayPal platforms.

### Website - Initiatives and Daily Maintenance

In 2018 we updated the ATDRMC website with a new template resulting in the need to update fonts and style sheets on our website pages. This 'clean-up' is still in progress.

Throughout the year, the Technology Team worked to keep the website current with relevant information for members including posting events and editing content and assisted ATDRMC members with technical issues. The team also helped members with technical issues regarding the site. The team also monitors site usage through Google Analytics.

### Google Admin

The technology team served as administrator for Google Suite, setting up new users, troubleshooting issues that users encountered and providing excellent IT customer service.

### Initiatives

- **Chapter Leadership Resources Website**
  - The technology team created a Google site titled *Chapter Leadership Resources Website*. This Google site was built out to contain a listing of common resources used by our ATDRMC leaders. It is a valuable, time-saving resource for our board of directors and improves the onboarding process for new board members.
- **Special Interest Groups (SIG)**
  - This year the Learning Technologies SIG was launched and the first meeting had over 25 attendees. The meetings were so successful that an ATDRMC member volunteered to become the Learning Technologies SIG Director.
  - A second Instructional Design SIG was formed. The first meeting of this SIG is scheduled for 2019.
  - These two SIGs were sponsored by the Vice President of Technology and will transition under the Vice President of Programming role.

### Succession Planning

In 2018 the process to transfer the role of Vice President of Technology from Ginger Nichols to Thomas Toth began as Ginger is now the 2019 President Elect. The transfer should be complete in early 2019.

# ATD-RMC 2018 Annual Report

December 31, 2018

## Communication & Social Media Report

Submitted by Lisa Gilliard, VP Communications

### 2018 Communications & Social Media Goals

- Analyze the social media and communication reach to our members
- Eliminate the redundancy of using both Constant Contact and Wild Apricot to communicate to our members
- Evaluate the effectiveness of the chapter monthly newsletter and change if needed
- Evaluate the effectiveness of our LinkedIn group – close if not being used
- Increase Twitter followers and Facebook fans

Chapter communications were transitioned from Constant Contact to Wild Apricot. We ensured that the mailing lists in Constant Contact were reflected in Wild Apricot and included the appropriate members. I also spoke with the appropriate staff at ATD national to ensure that Wild Apricot mailings were being sent to just our local chapter members. I worked with Wild Apricot Staff members to ensure that the software could accommodate the needs of our chapter.

After evaluating the effectiveness (open rate) of our monthly newsletter, we decided to communicate with our members via weekly eBlasts. Each week highlights specific chapter information. During 2018, we had an average of 252 active contacts. Our overall email open rate was 46%. Our click through rate was 4%.

In addition to email communications, Social Media platforms (Facebook, Twitter and LinkedIn) were used as avenues to communicate ATD-RMC events such as monthly meetings and networking events and pertinent field information.

Our LinkedIn group was used as an online professional community group for ATD-RMC members in order to share Talent Development resources with peers. The group consisted of 639 members but has been inactive. The group will be closed by 12/31/2018.

### ATD-RMC's Social Media Links:

Facebook: <https://www.facebook.com/atdrmc/>

Twitter: <https://twitter.com/atdrmc>

LinkedIn: <https://www.linkedin.com/company/atd-rocky-mountain-chapter/>

Shutting Down - LinkedIn: <https://www.linkedin.com/groups/99819>

The following analytics were gathered from Hootsuite Analytics from 01 January through 24 November 2018.

### Facebook Analytics

- In 2018, ATD-RMC's Facebook page increased by 4 *fans* to a total 172 *fans*. ATD-RMC's engagement score for the year was 349, which accounted for 175 *reactions*, 6 *comments* and 168 *shares*.
- In 2018, ATD-RMC's Facebook page accounted for 400 clicks on the links shared in the posts.
- **Since the 2016 Annual Report, we have increased our Facebook fans by 83%.**
- **Our engagement score jumped from 94 to 349.**

### Twitter Analytics

- In 2018, ATD-RMC's Twitter account increased by 53 *followers* to a total of 830 *followers*.
- ATD-RMC's Twitter's engagement score for the year was 256, this is accounted for by the sum of interactions received for the tweets published; retweets, replies and likes.
- In 2018, ATD-RMC's Twitter traffic score is 390, this is accounted for by the total clicks on the links in the tweets.
- **Since the 2016 Annual Report, we have increased our followers by 81%.**
- **Our engagement score jumped from 29 to 256.**

The increase on both of these accounts can be attributed to increased posting and a more focused approach to our posts. This strategy will continue into 2019 in order to build the ATDRMC brand and name recognition.

## Finance Report

Submitted by Lisa Vallad, VP of Finance



# ATD-RMC 2018 Annual Report

December 31, 2018

## 2018 Income and Expense Highlights:

- Our cash balance year over year grew from approximately \$32,000 to \$34,000, a 7% increase.
- We had a net income of approximately \$960 for the year ended December 31, 2018.
- Anticipated revenues were not as high as budgeted; approximately \$13,720 actual compared to approximately \$19,260 budgeted.
- However, expenses were also lower than budgeted, approximately \$18,100 actual compared to approximately \$23,900 budgeted.

## Association for Talent Development - Rocky Mountain Chapter

### BALANCE SHEET As of December 31, 2018

	TOTAL
<b>ASSETS</b>	
Current Assets	
Bank Accounts	
First Bank Checking	19,436.16
FirstBank Savings	14,455.31
<b>Total Bank Accounts</b>	<b>\$33,891.47</b>
Accounts Receivable	
Accounts Receivable	0.00
<b>Total Accounts Receivable</b>	<b>\$0.00</b>
Other Current Assets	
Credit Card Receivables	0.00
Prepaid Expenses	0.00
Prepaid Communication Expenses	0.00
Prepaid Program Expenses	0.00
Prepaid Technology Expenses	208.00
<b>Total Prepaid Expenses</b>	<b>208.00</b>
Undeposited Funds	0.00
<b>Total Other Current Assets</b>	<b>\$208.00</b>
<b>Total Current Assets</b>	<b>\$34,099.47</b>
<b>TOTAL ASSETS</b>	<b>\$34,099.47</b>
<b>LIABILITIES AND EQUITY</b>	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable	0.00
<b>Total Accounts Payable</b>	<b>\$0.00</b>
Other Current Liabilities	
Other Current Liabilities	1,428.00
<b>Total Other Current Liabilities</b>	<b>\$1,428.00</b>
<b>Total Current Liabilities</b>	<b>\$1,428.00</b>
<b>Total Liabilities</b>	<b>\$1,428.00</b>
Equity	
Opening Bal Equity	0.00
Retained Earnings	31,711.58
Retained Earnings*OE	0.00
Net Income	959.89
<b>Total Equity</b>	<b>\$32,671.47</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$34,099.47</b>

# ATD-RMC 2018 Annual Report

December 31, 2018

## Association for Talent Development - Rocky Mountain Chapter

### Profit and Loss

January - December 2018

	Total
<b>Income</b>	
4000 Membership Income	
4010 Membership Dues	14,036.94
4020 Dues Paid to National	-3,318.00
<b>Total 4000 Membership Income</b>	<b>\$ 10,718.94</b>
4400 Chapter Income	
4410 CHIPS	2,191.08
4440 Sponsors	1,350.00
4490 Interest Inc	13.35
<b>Total 4400 Chapter Income</b>	<b>\$ 3,554.43</b>
4500 Program Income	
4510 Monthly Program Income	1,348.75
4530 CPLP Virtual Study Group	428.00
<b>Total 4500 Program Income</b>	<b>\$ 1,776.75</b>
<b>Total Income</b>	<b>\$ 16,050.12</b>
<b>Gross Profit</b>	<b>\$ 16,050.12</b>
<b>Expenses</b>	
5100 Prog Exp	
5110 Facility and Food/Beverage	5,384.87
5120 Communications	488.00
5130 Technology - Programs	1,563.89
5140 Printing-Programs	39.87
5145 Program Gifts	2,021.34
5175 New Membership Events	209.98
5180 Executive Advisory Council	386.26
<b>Total 5100 Prog Exp</b>	<b>\$ 10,094.21</b>
5200 Board Expenses	
5205 Board Exp	517.92
5210 BOD Meet'g/Recog.	848.08
5220 ICE Conference Expenses	459.00
5230 Leadership Conf	2,641.23
<b>Total 5200 Board Expenses</b>	<b>\$ 4,466.23</b>
5500 Operating Expenses	
5530 Permits and Fees	20.00
5540 Postage	155.35
5550 Insurance	1,125.55
5575 Supplies	206.63
5580 Tax Return Preparation	250.00
5590 Management Fee	1,066.45
5595 Bank/CC fees	705.81
<b>Total 5500 Operating Expenses</b>	<b>\$ 3,529.79</b>
<b>Total Expenses</b>	<b>\$ 18,090.23</b>
<b>Net Operating Income</b>	<b>-\$ 2,040.11</b>
<b>Other Income</b>	
4600 Other Income	
4610 Chapter Income	3,000.00
<b>Total 4600 Other Income</b>	<b>\$ 3,000.00</b>
<b>Total Other Income</b>	<b>\$ 3,000.00</b>
<b>Net Other Income</b>	<b>\$ 3,000.00</b>
<b>Net Income</b>	<b>\$ 959.89</b>

# ATD-RMC 2018 Annual Report

December 31, 2018

## CPLP Virtual Study Group Report

Submitted by Shannon Wzientek, VP of Certifications

In 2018, Rocky Mountain Chapter (RMC) hosted two CPLP virtual study group cohorts among six chapters (RMC, Central Florida, West Virginia, Valley of the Sun, Suncoast, Austin). The cohorts focused on preparing CPLP candidates for the Knowledge Exam. The virtual study group provides encouragement and support along with resources and study tips to anyone, anywhere and at whatever place they are in their CPLP journey.

In 2019, ATDRMC will shift hosting the study groups to other ATD chapters across the United States but will continue to administer the back-end operations of the CPLP Study Group.

Cohort	Number of Participants	Co-Facilitating Chapters
<b>2018 Spring (Feb thru May)</b> 13 sessions Included: Skills Application Exam study session	23	Rocky Mountain Central Florida West Virginia Valley of the Sun Suncoast Austin
<b>2018 Fall (Aug thru Nov)</b> 13 sessions Included: Skills Application Exam study session	22	Rocky Mountain Central Florida West Virginia Valley of the Sun Suncoast Austin
<b>Total Events: 2</b>	<b>Total Participants: 45</b>	<b>Total Number of Chapters: 6</b>

The geographical locations of participants continues to increase; cohorts now include participants located across the United States as well as internationally. Additionally, other chapters have partnered with the Rocky Mountain chapter to assist with the facilitation efforts, resulting in waived participation fees for their members as well.

The study group has created a CPLP community, which has fostered collaboration, networking, and ongoing relationships. Study group participants continue to keep all involved in their cohort's abreast of their accomplishments.

**Results: two 2018 participants have earned their CPLPs and five others have passed the Knowledge Exam and are either preparing for the Skills Application Exam or are awaiting their results of the Skills Application Exam.**

Other chapters continue to reach out seeking guidance pertaining to the study group and/or with an interest in becoming involved. This has created partnerships across many chapters and growth continues to be seen. The Rocky Mountain Chapter looks forward to offering two cohorts in 2019.

Chapter CPLPs continue to be recognized and are encouraged to become involved through postings to our Talent Musings blog, volunteer efforts, etc.

# ATD-RMC 2018 Annual Report

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December 31, 2018

## Other Areas of Focus

Submitted by Jean Eckhoff, President

### ICE Volunteer Coordination

ATD-RMC President Jean Eckhoff will be directing the ATD International Conference and Exposition (ICE) Volunteer Coordinating Committee as we welcome ICE to Denver in 2020. Jean will begin preparations this year by liaising with ATD National to fully understand the process. Her efforts will be focused on using technology to simplify recruiting/selecting/training volunteers, then coordinating and managing them during ICE from the pre-conference workshops through the last day.