KANSAS CITY CHAPTER
Association for Talent Development

2015 Annual Report

Our mission: To promote excellence in the field of learning and development

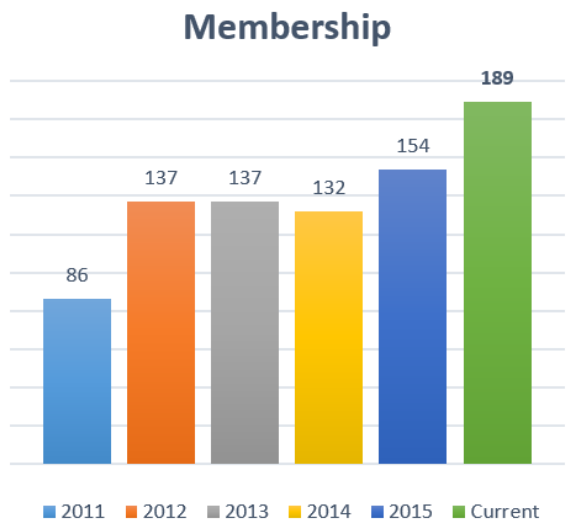
The education events I have attended have given me valuable knowledge I can use in my job.

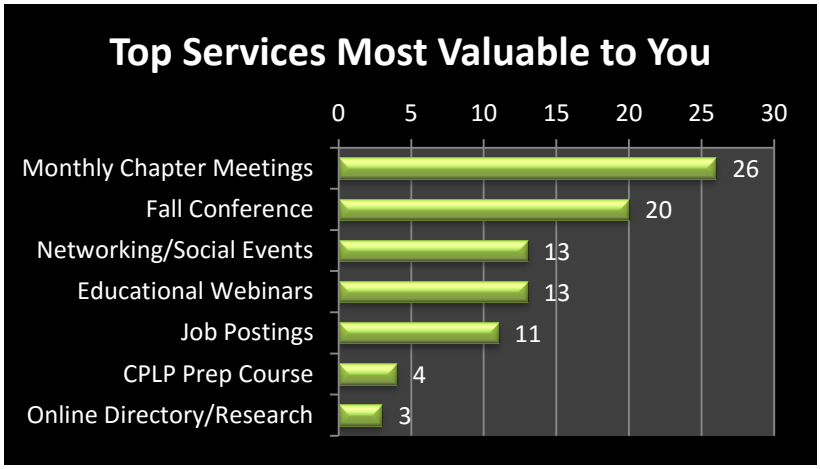
I have enjoyed getting to know members in ATD!

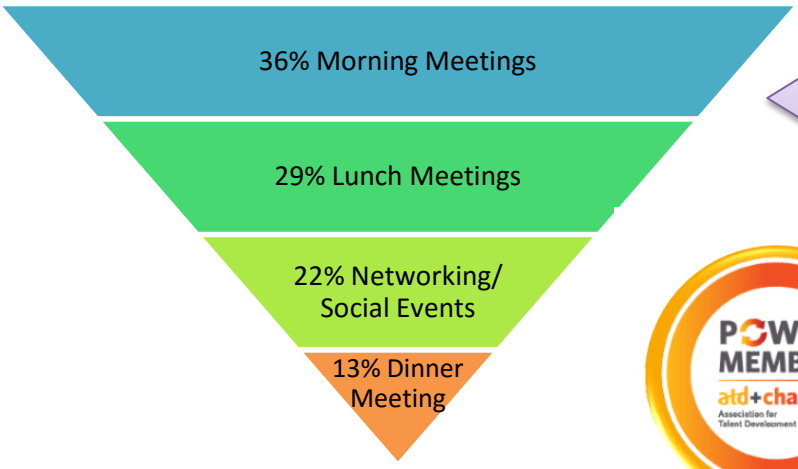
Great Chapter!

It is very rewarding being an ATDKC member!

The speakers have been interesting and thought provoking!







Most popular meeting times

POWER MEMBER
atd+chapter
Association for Talent Development

48%

Highest Joint Membership percentage in 2015

KANSAS CITY CHAPTER
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Letter from the 2015 President

2015 was most certainly a year of growth for the Kansas City Chapter of ATD. We updated our programs with a new and improved Excellence in Practice (EiP) Awards ceremony, added an exciting Throwdown competition, formed a CPLP Study Group, and got to know each other at the Great Connections Networking event. Each of these changes had an impact on our chapter and we could not have made it through the year without your support, encouragement and recommendations. 2015 turned out to be an amazing year, and we are so appreciative of your time and commitment to ATD.

Being the President in 2015 has provided me with tremendous opportunities to collaborate with many of you, and I am so appreciative of your support. Getting to know so many talent development professionals in the Kansas City area has been an incredible blessing!

I need to thank the board members for their dedication to our chapter. The chapter membership grew by 30%! This board was dedicated to excellence and improvement. The members worked diligently each month to increase involvement and provide beneficial programming. Additionally, our hard working Board Members, EiP Planning Committee and Fall Conference Planning Committee worked to achieve successful events, increase attendance in our monthly meetings, build professional relationships with our current and new sponsors, and most importantly, believe in the mission of our chapter.

I am pleased to turn over the leadership reins to Christy Rogers. She is an inspiration and has the motivation and drive to take this chapter to the next level in 2016.

I look forward to seeing you all in 2016 at monthly meetings and appreciate the honor of being your President in 2015. I now have the opportunity to serve as a Past-President and ATD National Advisor for Chapters in 2016. I look forward to another incredible year!

With great appreciation,

Sally Koppy, M.S.Ed.

2015 President, ATD Kansas City Chapter

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Greeting from the 2016 President

I am truly impressed with this year's membership. We are lucky to have members with such a variety of experience and backgrounds. This enables us to learn greatly from each other.

Thank you for your excellent feedback through the annual survey. Many of the new initiatives are based on your feedback. The 2016 goals came from the board retreat in December 2015 and from the Board Executive Committee.

I am extremely proud of the accomplishments so far from this year's board. At the beginning of the year we launched a new **Ambassador program** that will help guide our new members (35 so far this year!) and we created a new **Mentoring program** called "Engage" (the name says it all). In April, we started our second annual **CPLP study group**, and the board strives to bring you quality and relevant monthly education and networking opportunities.

On **September 30** of this year we will host our **annual fall conference**. Get ready for an action packed day. This conference will focus on the current state of **learning technology**, such as virtual training, gamification, video use, e-learning and LMS implementation.

Enjoy your summer! I look forward to the second half of 2016!

We appreciate you!

Christy Rogers

President, ATD Kansas City Chapter

KANSAS CITY CHAPTER
Association for Talent Development

Financials

KC Chapter - ATD
Statement of Financial Position
December 31, 2015

	Dec 31, 15
ASSETS	
Current Assets	
Checking/Savings	
Bank of Blue Valley	21,568.08
Bank of the West	7,279.87
Total Checking/Savings	28,847.95
Other Current Assets	
DWS Investment Account	3,648.66
Petty Cash	100.00
Total Other Current Assets	3,748.66
Total Current Assets	32,596.61
Fixed Assets	
Computer Equipment	2,046.95
Accumulated Depreciation	(2,046.95)
Total Fixed Assets	-
TOTAL ASSETS	32,596.61
LIABILITIES & EQUITY	
Equity	
Retained Earnings	32,829.64
Net Income	(233.03)
Total Equity	32,596.61
TOTAL LIABILITIES & EQUITY	32,596.61

	Jan - Dec 15
Income	
ASTD Chapter Award	500.00
ASTD Chapter Incentive Program	579.00
Educational Programs	
Awards Programs	1,605.00
General Membership Meetings	3,260.00
Annual Conference	12,224.00
Total Educational Programs	17,089.00
Interest	2.94
Membership	
New	3,450.00
Renewal	4,140.00
Total Membership	7,590.00
Sponsorships/Advertising	
Sponsorships	8,750.00
Job Bank	300.00
Total Sponsorships/Advertising	9,050.00
Total Income	34,810.94
Expense	
Office Supplies	122.72
Educational Programs Expense	
Annual Conference	7,162.87
Annual Leadership Conference	1,413.29
Awards Program Expense	3,012.67
General Membership Meeting Exp	3,311.43
Educational Programs Expense - Other	19.72
Total Educational Programs Expense	14,919.98
Operating	
Advertising	150.00
Bank Service Charges	1,858.63
Conventions & Meetings	
Board Meeting Expense	1,428.36
Conventions & Meetings - Other	1,125.00
Total Conventions & Meetings	2,553.36
Insurance	
D&O	1,051.00
Total Insurance	1,051.00
Miscellaneous	100.46
Postage and Mail Expense	2.70
Professional Services	
Management Fee	9,000.00
Total Professional Services	9,000.00
Web Site Expense	5,285.12
Total Operating	20,001.27
Total Expense	35,043.97
Net Income	(233.03)

KANSAS CITY CHAPTER
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2015 Goals and Progress

President

Board Member Onboarding

- Onboard new members. (Three new executives joined the board)
- Assess chapter risks at the February 2015 board meeting. (Completed)

President-Elect

Board Member Descriptions

- Update and retain clear, concise descriptions for Board Member Roles.

CPLP Study Group

- Organize CPLP study group (First annual CPLP group was held spring/summer 2015)

Committee Recruitment and Organization

- Encourage Board Members to seek out Directors to assist with programs and tasks. (Three new directors joined the board)
- Provide survey forms for members to fill out at meetings if they would like to volunteer. (Form is available on www.tdkc.org)

VP of Communications and Marketing

Communications

- Ensure that information shared with our members is accurate, consistent, meaningful, and of value. (Completed)
- Ensure that communications are in compliance with ATD guidelines. (Completed)

Marketing

- Work with EiP Committee and Fall Conference Committee to effectively market these events. (54 attended the EiP Awards Night, 95 attended the Fall Conference)

VP of Programs and Events

EiP Awards

- Work with Excellence in Practice committee to hold a successful event in March of 2015. (54 attended the EiP Awards Night. Awards were presented in the following categories: Coaching and Mentoring, Career Development, Talent Development, Performance Improvement, Organizational Learning & Development, Learning Technologies)

Fall Conference

- Form a fall conference committee and hold an event focused on training facilitation in late October of 2015. (The Pinnacle Performance Company facilitated the conference with an emphasis in communication skills for trainers. 95 attended.)

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VP of Membership

Member Recruitment (Completed)

- Tap into the resources of current members
- Invite members to attend CPLP study groups
- Personal touch
    - Ask each member to reach a new member. Ask each member to bring a first time guest to monthly chapter meetings.
    - Provide chapter information on how to present benefits of membership to co-workers, colleagues, etc.
- Social Media/Online Networking
    - Share benefits online to prospective new members; invite them to a monthly meeting.
    - Invite guests from other local professional association groups.
    - Post to various online boards (LinkedIn, etc.)
- Communications
    - Communicate to past members through Email or written communication.
    - Invite affinity groups to meetings and networking events.

Member Retention (Completed)

- Utilize the genius within
    - Seek out current members to lead or join committees, volunteer, and share resources.
    - Inquire about members industry specific knowledge and sharing a best practice: Member Moment (at monthly meetings)
- Use self-selection to find those interested in volunteering for:
    - Planning committees
    - Meeting prep
    - Hosting meetings
    - Potential speakers within the membership
    - Brainstorming sessions
- Personal communications and networking
    - Member spotlight
    - Community Volunteerism, participate as a group in a local community outreach.

Membership

- Market PowerMembership on our website, in a monthly email blast, and at each chapter meeting. (Completed)
- Send an annual survey to all members in November of 2015. (Completed)

Ambassador Program

- Recruit a Director of Ambassador Program and work to develop program in 2015. (Completed)

VP of Finance

Dashboard

- Create a dashboard for board financial reporting. (Completed)

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2016 Goals

President – Christy Rogers

- Board Member Onboarding
- Build the Leadership Tree
- Sponsorships streamlined
- Board/Member Communications streamlined. Google for Nonprofit: research qualifications

President-Elect – Claudia Mills

- Succession Planning for future board members
- Support VP of Membership

VP of Communications and Marketing – Ashley Meredith

- Encourage more member involvement with our social media campaigns
- Add the following pages to the ATDKC website
    - Sponsors
    - Member Highlight
    - Resources

VP Programs and Events – Shannon Swift
Director of Programs – Consuela Shorter

- Establish Sub Committee Structure
- Determine Succession plan for key Roles – VP, Directors
- Clarify the volunteer commitments: time, tasks involved, schedule
- Document Best Practices over the course of 2016

VP of Membership – Amy Swaminathan

- Impact membership by leveraging social media and ATDKC website
- Launch Ambassador Program
- Establish Mentorship Program named ENGAGE.

VP of Finance – Bob Barickman

- Maintain a dashboard for board financial reporting
- Encourage the use of our chip code
- Research ways to increase our sponsorships

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Director of Mentoring Program – Marva Allen-Fowler

- Create a database of potential mentors and mentees and match them based on personal and professional self-assessments
- Using pre-established expectations and activities, engage mentors and mentees throughout a 9 month partnership

Director of Ambassador Program – Tracie Glasscock

- Reach out to new members within two weeks of membership start
- Set up a f2f or phone meeting
- Greet new members at each function and introduce them to others
- Facilitate a get-acquainted exercise at monthly meetings
- Follow up with new members at six months to answer questions and determine satisfaction levels

Director of CPLP Program – Mike Edwards

- Organize CPLP study group

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2015 Volunteers

All of these accomplishments would not be possible without the tireless work of the many volunteers who have supported the chapter this year. These include our Fall Conference committee, chapter meeting presenters, CPLP study group facilitators, website warriors, and more. We would like to give special thanks and recognition to the following individuals.

Josh Dykstra
Mike Edwards
Suzanne Frawley
Tracie Glasscock
Kate Guenther
Amy Hagen
Misty Harding
Stephanie Hong
Laura Janusik
Sally Koppy
Joan Lightsey
Sue Maden
Karen Martley
Heidi Matthews
Ashley Meredith
James Newman
Peter Nielsen
Dr. Paul White
Paula Peters
Shawn Scheffler
Luke Schnoebelen
Lori Schreiber
Steve Smith
Amy Swaminathan
Shannon Swift
Angela Viehland

KANSAS CITY CHAPTER
Association for Talent Development

2015 Board Members

Executive Committee

President ..... Sally Koppy

Past-President ..... Jill Joiner

President-Elect ..... Christy Rogers

VP of Communications & Marketing ..... Ashley Meredith

VP of Finance ..... Bob Barickman

VP of Membership ..... Joan Lightsey

VP of Programs & Events ..... Kate Guenther

Directors

Director of Ambassador Committee ..... Claudia Mills

Director of Students ..... Shannon Swift

2016 Board Members

Executive Committee

President ..... Christy Rogers

Past-President ..... Sally Koppy

President-Elect ..... Claudia Mills

VP of Communications & Marketing ..... Ashley Meredith

VP of Finance ..... Bob Barickman

VP of Membership ..... Amy Swaminathan

VP of Programs & Events ..... Shannon Swift

Directors

Director of Ambassador Program ..... Tracie Glasscock

Director of CPLP Program ..... Mike Edwards

Director of Event Management ..... Peter Nielsen

Director of Mentoring Program ..... Marva Allen-Fowler

Director of Programming ..... Consuela Shorter