

ATD Kansas City

ANNUAL REPORT



2019

LETTER FROM THE PRESIDENT

While 2020 has been a year we will never forget, I would not be doing my job as past-president of ATDKC if I didn't remind us of the incredible things we accomplished in 2019. This document is a sweet reminder of the year of in-person meetings, conferences with large rooms full of people learning and connecting, and great fun and food being had by all.

I'm honored to have served you for my year; and like me, I know you are grateful for the 2020 board who has worked so hard to make programming happening during a pandemic so our members and guests can continue to grow!



Amy Swaminathan and Shannon Swift accepting Chapter of the Month award for Power Membership, ICE 2019

Shannon Swift

CHAPTER PRESIDENT/2019 BOARD

2019 ATD Kansas City BOARD OF DIRECTORS



Shannon Swift

President



Pete Nielsen

Past President



Amy Swaminathan

President-elect



Heidi Matthews

VP of Programs
& Events



Tracy Roudebush

VP of Marketing and
Communications



Paul Christenson

VP of Membership



Claudia Mills

VP of Finance



Art Gangel

Director of
Sponsorships



Megan Galloway

Director of Social Media

2019 ATD Kansas City BOARD OF DIRECTORS



Christy Rogers

Director of
Technology



Angela Buzard

Director of
Events



Dee Ruggles

Director of
Member Data



Sally Kopp

Chapter Secretary
and Chapter Historian

2019 Summary

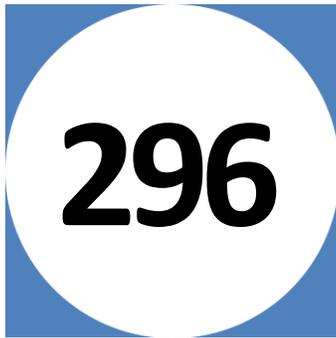
When we started the year of 2019, our 70th anniversary as a chapter, we had approximately **180** active members at ATDKC with about 59% of that number also being members of our national organization, ATD. We ended the year with **296** active members and about 50% of those members also being national members. That is some amazing growth, right?

Each of our functional areas---Membership, Programs & Events, Marketing & Communication and Finance---contributed to that success. Thanks to Programs & Events, we had more special interest group meetings in 2019 than we've ever had before. These meetings are free to members and low cost to non-members and allow attendees to network and learn from their peers about onboarding, e-learning, and leadership development.

Our membership team did a great of engaging with potential members at these events, at our regular chapter meetings, and special events like the Excellence in Practice Awards and our Annual Fall Conference. Our Ambassador team, part of our Membership committee, reached out to every new member to ensure that person felt welcomed and pointed in the right direction. Because of all the new members and increased activity, we created a new role called Director of Volunteers. Since January 2020, Tyler Dixon has been in the role and has done a great job of understanding the board's various needs and connecting members to those volunteer opportunities.

Finally, our Marketing & Communications team was diligent in communicating regarding our events through emails and our Social Media channels. Our Finance team helped us by creating a template for us to be able to estimate our income and our expenses, and we were able to stay within our budget throughout 2019, in fact, we actually earned income that we were able to give back in 2020 through scholarships. Now, that is what I call success!

MEMBERSHIP BY THE NUMBERS



Total number of chapter members as of the last day of the reporting period.



Percentage of total chapter members who are Power Members, as of the last day of the reporting period. (Power Members are those who are members of both the ATDKC and ATD.)



The percentage of members who indicated on our annual survey that they would recommend our chapter to others.

FINANCIAL REPORT — Assets as of 12/31/19

KC Chapter - ATD Statement of Financial Position December 31, 2019

	<u>Dec 31, 19</u>
ASSETS	
Current Assets	
Checking/Savings	
Bank of Blue Valley	83,349.85
Total Checking/Savings	<u>83,349.85</u>
Accounts Receivable	
Accounts Receivable	3,296.25
Total Accounts Receivable	<u>3,296.25</u>
Other Current Assets	
*Undeposited Funds	15.00
Total Other Current Assets	<u>15.00</u>
Total Current Assets	<u>86,661.10</u>
TOTAL ASSETS	<u><u>86,661.10</u></u>
LIABILITIES & EQUITY	
Equity	
Retained Earnings	59,690.98
Net Income	26,970.12
Total Equity	<u>86,661.10</u>
TOTAL LIABILITIES & EQUITY	<u><u>86,661.10</u></u>

FINANCIAL REPORT — Income and expenses as of 12/31/2019

KC Chapter - ATD

Statement of Revenues and Expenses-Budget vs. Actual

January through December 2019

	<u>Jan - Dec 19</u>	<u>Budget</u>	<u>\$ Over Budget</u>	<u>% of Budget</u>
Income				
Administrative Income				
Awards and Recognition	1,000.00	1,000.00	0.00	100.0%
Administrative Income - Other	0.00	0.00	0.00	0.0%
Total Administrative Income	<u>1,000.00</u>	<u>1,000.00</u>	<u>0.00</u>	<u>100.0%</u>
Finance				
Sponsorships	11,000.00	3,500.00	7,500.00	314.29%
Finance - Other	0.00	0.00	0.00	0.0%
Total Finance	<u>11,000.00</u>	<u>3,500.00</u>	<u>7,500.00</u>	<u>314.29%</u>
ASTD Chapter Award	2,534.72			
Programs				
Workshops	7,235.00	3,500.00	3,735.00	206.71%
Special Interest Groups	640.00	300.00	340.00	213.33%
General Membership Meetings	6,600.00	10,000.00	-3,400.00	66.0%
EiP Awards Programs	2,500.00	2,000.00	500.00	125.0%
Annual Conference	21,610.00	18,000.00	3,610.00	120.06%
Social Events	0.00	200.00	-200.00	0.0%
Total Programs	<u>38,585.00</u>	<u>34,000.00</u>	<u>4,585.00</u>	<u>113.49%</u>
Membership				
New Memberships	7,650.00	3,000.00	4,650.00	255.0%
Renewal Memberships	7,100.00	5,500.00	1,600.00	129.09%
ASTD Chapter Incentive Program	5,662.59	6,500.00	-837.41	87.12%
Membership - Other	0.00	0.00	0.00	0.0%
Total Membership	<u>20,412.59</u>	<u>15,000.00</u>	<u>5,412.59</u>	<u>136.08%</u>
Marketing/Communications				
Job Bank	2,550.00	300.00	2,250.00	850.0%
Marketing/Communications - Other	0.00	0.00	0.00	0.0%
Total Marketing/Communications	<u>2,550.00</u>	<u>300.00</u>	<u>2,250.00</u>	<u>850.0%</u>
Total Income	<u>76,082.31</u>	<u>53,800.00</u>	<u>22,282.31</u>	<u>141.42%</u>
Gross Profit	76,082.31	53,800.00	22,282.31	141.42%

KC Chapter - ATD
Statement of Revenues and Expenses-Budget vs. Actual
 January through December 2019

	Jan - Dec 19	Budget	\$ Over Budget	% of Budget
Expense				
Networking Meeting Expense	1,113.32			
Membership Expense				
Supplies	238.70	250.00	-11.30	95.48%
New Member Gifts	0.00	250.00	-250.00	0.0%
Membership Expense - Other	0.00	0.00	0.00	0.0%
Total Membership Expense	238.70	500.00	-261.30	47.74%
Programs Expense				
Workshops	2,613.72	3,000.00	-386.28	87.12%
Special Interest Group	114.95	300.00	-185.05	38.32%
General Membership Meeting Exp	4,063.09	5,000.00	-936.91	81.26%
EiP Awards Program	4,986.83	5,000.00	-13.17	99.74%
Annual Conference	8,597.06	10,500.00	-1,902.94	81.88%
Social Event Expense	200.00	1,000.00	-800.00	20.0%
Programs Expense - Other	0.00	0.00	0.00	0.0%
Total Programs Expense	20,575.65	24,800.00	-4,224.35	82.97%
Marketing/Communication Expense				
Simple Texting	0.00	450.00	-450.00	0.0%
Buffer Social Media Management	144.00	200.00	-56.00	72.0%
70th Anniversary Celebration	114.88	900.00	-785.12	12.76%
Web Site Expense	2,135.94	2,500.00	-364.06	85.44%
Wufoo	299.00	300.00	-1.00	99.67%
Zoom	0.00	700.00	-700.00	0.0%
Marketing/Communication Expense - Other	0.00	0.00	0.00	0.0%
Total Marketing/Communication Expense	2,693.82	5,050.00	-2,356.18	53.34%
Administrative				
Bank and Credit Card Fees	2,689.20	2,000.00	689.20	134.46%
Conventions & Meetings				
Conventions & Meetings - Other	776.91	500.00	276.91	155.38%
Board Meeting Expense	1,881.55	800.00	1,081.55	235.19%
Annual Leadership Conference	9,260.26	9,000.00	260.26	102.89%
Conventions & Meetings - Other	0.00	0.00	0.00	0.0%
Total Conventions & Meetings	11,918.72	10,300.00	1,618.72	115.72%
Insurance				
D&O	0.00	465.00	-465.00	0.0%
General Liability	460.24	720.00	-259.76	63.92%
Insurance - Other	0.00	0.00	0.00	0.0%
Total Insurance	460.24	1,185.00	-724.76	38.84%
Miscellaneous	97.66	50.00	47.66	195.32%
Postage and Mail Expense	24.88	100.00	-75.12	24.88%
Management Fee	9,300.00	9,300.00	0.00	100.0%
Administrative - Other	0.00	0.00	0.00	0.0%
Total Administrative	24,490.70	22,935.00	1,555.70	106.78%
Total Expense	49,112.19	53,285.00	-4,172.81	92.17%
Net Income	26,970.12	515.00	26,455.12	5,236.92%

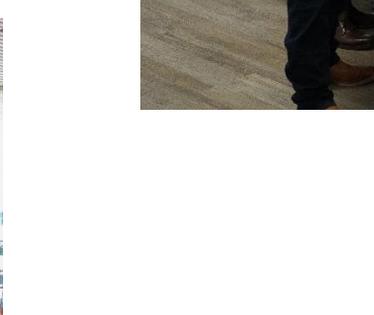
2019 ANNUAL GOALS

At the 2019 Board of Directors' Annual Planning Retreat held on January 4, 2019 at the Kauffman Foundation, the below goals were set for the upcoming year.

Area	Goal Description
Membership	Improving new member engagement and experience
Programming and Professional Development	Balanced attendance across programs, ensuring that we are meeting the needs across our members.
	Increase opportunities to collect survey information from members by capitalizing on existing meetings and conferences
	Increase use of technology and trends in programming
Operations and Finance	Breakeven or profit on chapter events, programs and chapter meetings.
	Fully staff the Finance team.
	Increase transparency about how we use our chapter funds.
	Put Finance on the monthly board meeting agenda.
	Create and finalize an approval process for expenditures.
	Implement a conflict of interest agreement for the board.
Marketing and Communication	Create a Social Media Strategy & Plan
	Create plan to increase engagement of members at levels 2-3
	Create plan to increase engagement of members at levels 4-5
	Partner w/Membership team to find new venues to recruit new members
	Create an overall TD calendar
Administration	Create Standard Operating Procedures for our chapter.
	Create board accountability for results (the what).
	Create board accountability for team effectiveness (the how).

CHAPTER

Programs & Events



CHAPTER

Programs & Events

