

Minutes of the ATD Tulsa Chapter Board Meeting

Monday, September 9, 2019

3:30 p.m. to 5:00 p.m.

This meeting was held via Skype.

Call to Order

President Walt Hansmann called the meeting to order at 3:42 p.m.

Roll Call

Walt Hansmann, CPLP, President
Linda Jenkins, Past President
Lewana Harris, President-Elect
Kim Boggs, VP of Marketing
Stacy Davis, CPLP, VP of Programming

Absent

Michael Chancey, VP of Administration
Ashley Whitfield, VP of Membership (Excused)
Skip Eller, VP of Finance (Excused)

6 of 8 board members were present. A quorum was established.

Approval of the Agenda

Stacy moved, Kim seconded approval of the agenda. MOTION CARRIED.

Administrative

- a. Lewana moved, Linda seconded to accept the resignation of Michael Chancey as VP of Administration. Walt explained that he removed Michael as an admin on Wild Apricot and changed the password for the admin email. Linda is now monitoring the admin email. Walt requested that Michael return the PO Box key. MOTION CARRIED.
- b. Kim moved, Lewana seconded approval of the August 5th Board Meeting. There was a change on page 2 of the minutes to reflect the correct Bylaw cited as 5.6 and not 5.7. MOTION CARRIED
- c. Linda is coordinating the Bylaws and Policies Committee Meeting in Michael's absence. The next meeting is Monday, September 23 at 5:30 pm at the Panera on 15th Street (Cherry St.). One of our action items will be the Annual Risk Assessment.
- d. Election Results: Walt reported that the Elections Committee met virtually and certified the results of the election for the 2020 Board of Directors. Each of the four candidates received a majority of the votes cast and have been elected to serve on the ATD Tulsa 2020 Board of Directors. The board accepted the Elections Committee Report. Congratulations to VP of Accommodations Sunilyn Hertz; VP of Administration Kim Boggs; VP of Finance Linda Jenkins; and VP of Marketing Megan McManus! Walt also thanked the members of the Elections Committee, Teresa McKay, chair; and committee members Becky Greene, Aba Hammond, and Andrew Englebrecht for their service.

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3:30 p.m. to 5:00 p.m.

Financial Report

- a. There was no financial report.
- b. Annual Financial Audit/Review. Walt reported that our first option for a CPA to review the finances, was off the table. Kim contacted her CPA about the review, but they are not certified to conduct reviews. Linda and Lewana both offered suggestions for a CPA who could perform the review. Lewana has a contact from whom we will obtain their requirements for the review and communicated them to Skip to be ready by September 16.

Membership

- a. Ashley was absent and had not sent a membership report in time to be included in the meeting.
- b. The Networking Event was a great success from the feedback of the people attending. It appears we may have added a new member and a new Power Member as a result.
- c. ATD Member Week is upon us. It runs from today through September 13. Discounts are available to members, including membership renewal. For current Board Members who will be continuing on the Board in 2020, this discount is a good opportunity to renew your Power Membership!
- d. Ashley sent out the 2018 Member Survey. Some Board Members have responded with suggestions for the 2019 Member Survey. Ashley hopes to announce the survey at the September program meeting. Walt will follow-up with Ashley.

Professional Development

- a. Stacy provided the survey results of the August meeting. Most of the feedback was positive. There were comments about changing our menu for the day or changing the caterer for a different variety of food.
- b. The September Program is Amie Haar presenting Lean In. We will handle logistics as we have been all year. Walt recommended we begin to include Sunilyn Hertt, the incoming VP of Accommodations, as a committee member so she can have some on-the-job training prior to assuming office in January. Walt will send Suni's contact information to the board.
- c. Linda will assist Skip with check-in as part of her on-the-job training for her 2020 board role.
- d. Ashely needs to select someone to present the Power Member Minute.
- e. Stacy has door prizes.
- f. Walt will prepare and distribute the PowerPoint and we will adjust as usual at showtime.
- g. Stacy will have the monthly program survey ready and distribute by Tuesday, September 24.
- h. Walt related that Bob Mansur has not yet taken action to conduct an eLearning SIG. He has not yet contacted Sunilyn about hosting the event. He said he will. There may not be a lot of interest until they begin promoting the eLearning SIG again.
- i. Stacy asked if the November program could be extended beyond our normal end time. Walt will check on the

Communication

- a. The deadline for the next newsletter is September 24, 2019. Distribution planned for the 27th.
- b. Walt will send an article about the election results.

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State Conference

- a. The conference is Friday, October 25, with a pre-conference on Thursday, October 24.
- b. Lewana will prepare sponsorship levels and send them to the board for review.
- c. The website is ready. Bob Pike videos are being posted. We also expect a video from Kirkpatrick to arrive soon. We will continue to promote on all chapter communication methods. All board members are encouraged to “Like”, “Share”, “Comment”, and promote the conference to their personal networks.
- d. Target emails continue to be sent.
- e. Linda recommended we use the approaching Early-Bird Registration deadline, September 30, to encourage people to use the least expensive registration option, since registration prices increase October 1.
- f. Kim and Walt are working on a marketing blitz plan. The Bob Pike videos will be posted on 9/16 for video 3; 9/23 for video 4; and 9/30 for video 30.

Old Business

There was no Old Business

New Business

- a. ALC is October 10-12. Lewana will attend as President-Elect. The board discussed who to recommend sending as a second representative. The board concurred on an order of priority for the second candidate. Walt will contact Skip so he can make travel arrangements and contact the representatives we are sending to ALC.

Action Items

- a. Lewana will contact a CPA to secure their requirements for the annual financial review.
- b. Lewana will prepare the State Conference Sponsorships and distribute to the Board.
- c. Walt will send Sunilyn’s contact information to the board.
- d. Walt or Teresa McKay will contact 2020 Board Candidates.
- e. Walt will verify the times we have contracted for the BS Roberts room for November.
- f. Walt will contact Skip regarding ALC travel arrangements.
- g. Walt will follow-up with Ashley regarding the annual membership survey.
- h. Linda will schedule the Bylaws and Policies Committee Meeting with the annual risk assessment on the agenda.
- i. Kim will let us know if she can attend ALC.
- j. Upcoming board meetings will be:
 - Monday, September 9 – 3:30 to 5:00 PM
 - Monday, October 7 – 3:30 to 5:00 PM
 - Monday, November 4 – 3:30 to 5:00 PM
 - Monday, December 2 – 3:30 to 5:00 PM

Adjournment

The meeting was adjourned at 5:22 p.m.

Respectfully submitted by Kim Boggs and Walt Hansmann, CPLP

Date & Time: Monday, September 9, 2019 from 3:30 PM to 5:00 PM

Location: TBD

1. Call Meeting to Order
 - a. Roll Call – Kim Boggs
 - b. Confirm Quorum – Declare if Quorum is or is not Present – Walt Hansmann
 - c. Agenda for September 9th Board Meeting – **Review and Approve** – Walt Hansmann

2. Administrative
 - a. Michael Chancey Resignation – Walt Hansmann
 - b. Minutes from August 5, 2019 Board Meeting – **Review and Approve** – Walt Hansmann
 - c. Bylaws and Policies Committee Next Meeting Date and Location – Linda Jenkins
 - d. Election Results

3. Financial
 - a. Financial Report – **Review and Accept** – Skip Eller
 - b. Annual Financial Audit

4. Membership
 - a. Membership Report for September 2019 – **Review & Accept** – Ashley Whitfield
 - b. Report on New Member Event – Ashley Whitfield
 - c. ATD Member Week – Ashley Whitfield

5. Professional Development
 - a. August Program Survey Results
 - b. Programming Scheduled –
 - i. Upcoming Program: September 19 – Lean In – Amie Haar
 - ii. Content & Logistics – Stacy Davis
 - iii. Accommodations: Team Effort
 1. Meal – Meal & Room @ OSU-Tulsa BS Roberts Room – Stacy and Cathy ordering; Ashley doing nametags
 2. Check In – Skip
 - iv. Board Member Attendance & Participation
 - v. Board Communications for Attendees:
 1. Opening Welcome – Walt Hansmann
 2. Check-In to Program Meeting on Facebook – Kim Boggs
 3. Tweet During Meeting – Kim Boggs
 4. Welcome Guests – Ashley Whitfield
 5. Acknowledge New Members and Power Members and Power Member Minute **Who will do the Power Member Minute?** – Ashley Whitfield
 6. Sponsor Pitch for 2019 Programs – Lewana Harris
 7. Pitch for Future Programs – Stacy Davis
 - vi. Program –Lean In – Stacy Davis to introduce Amie Haar

- vii. At end of Program:
 - 1. Guest Presenter Thank You – Stacy Davis
 - 2. Door Prizes – Stacy Davis & Walt Hansmann
- viii. Post September Meeting Evaluation Online Distribution by Tuesday, September 24, 2019
- c. SIG (Special Interest Group) Update
 - 1. eLearning SIG update – Bob Mansur (Gateway) or Tulsa County can host one.
- 6. Communications
 - a. August Newsletter deadline for articles – Tuesday, September 24, 2019.
- 7. State Conference Planning Report
 - a. Dates: October 24-25
 - b. Sponsorship Levels - Lewana
 - c. Website ready - Walt
 - d. Target emails sent – Walt
 - e. Conference Marketing Plan – Kim and Walt
- 8. Old Business
- 9. New Business
 - a. ALC Attendance (Oct 10-12) ... Lewana? Anyone else?
- 10. Confirm Action Items – Walt Hansmann
- 11. Next Board Meeting: Monday, October 7
- 12. Adjourn Meeting – Walt Hansmann

Minutes of the ATD Tulsa Chapter Board Meeting

Monday, August 5, 2019

3:30 p.m. to 5:00 p.m.

This meeting was held at Matrix Service Company 7th Floor, and via conference call.

Call to Order

President Walt Hansmann called the meeting to order at 3:23 p.m.

Roll Call

Walt Hansmann, CPLP, President

Linda Jenkins, Past President

Lewana Harris, President-Elect – Via Skype

Kim Boggs, VP of Marketing

Ashley Whitfield, VP of Membership – Via Skype

Stacy Davis, CPLP, VP of Programming – Via Skype

Absent

Michael Chancey, VP of Administration (Excused)

Skip Eller, VP of Finance (Excused)

6 of 8 board members were present. A quorum was established.

Approval of the Agenda

Kim moved, Lewana seconded approval of the agenda. MOTION CARRIED.

Approval of the Minutes of Previous Meetings

- a. Linda moved, Kim seconded approval of the July 8th Board Meeting. MOTION CARRIED
- b. In Michael's absence, a Bylaws and Policies committee meeting has not been scheduled.
- c. Walt Provided a report from the Elections Committee:

We received nominations from four members.

- For VP of Accommodations: Sunilyn Hertt.
- For VP of Administration: Kim Boggs.
- For VP of Finance: Linda Jenkins.
- For VP of Marketing: Megan McManus.

We have all the required documentation from each nominee.

I can confirm that each nominee is a member-in-good-standing of the ATD Tulsa Chapter.

Information on the candidates will be posted on the chapter website this week.

We did not receive nominations for

- VP of Membership
- VP of Programming
- President-Elect

These positions may be filled by the 2020 Board of Directors within 30 days of taking office.

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Bylaw 5.7 provides guidance for filling the two VP positions.

Bylaw 8.3 provides guidance for filling the President-Elect position.

Financial Report

- a. There was no financial report. Skip has confirmed with Walt he will be prepared for a review of the Chapter Finances by September 15.

Membership

- a. Ashley reviewed the monthly membership report with the board members present.
- b. Ashley reported on the Member Networking Event on Wednesday the 7th.
- c. Ashley moved; Linda seconded to allow a 10% discount for ATD Tulsa Chapter Membership through the ATD Store with Power Membership during ATD Member Week September 9-13. MOTION CARRIED
- d. Ashley is preparing the annual member survey. She will send out last year's as a discussion document. Ashley suggested offering an incentive, for example two \$25 QuikTrip Gift Cards. Everyone responding to the member survey and including their name and email address will be entered into the drawing. Everyone agreed to try it.

Professional Development

- a. Stacy provided the survey results of the July meeting. Very few attendees are responding to the surveys.
- b. Linda moved; Kim seconded to accept the RFP for the November Program: *"Blended Learning: Enhancing Training Through the Use of Virtual Reality"*
- c. Skip will be at the meeting and will handle check-in.
- d. Ashley will handle the Power Member Minute.
- e. Walt will prepare and distribute the opening PowerPoint.
- f. The August Program Survey will be distributed by August 20.
- g. Walt reported Bob Mansur has not confirmed a date or location for the eLearning SIG.

Communication

- a. The deadline for the April newsletter is September 5, 2019.
- b. The announcement for nominations will be in the Newsletter and will be sent in a separate message.

State Conference

- a. The conference is Friday, October 25, with a pre-conference on Thursday, October 24.
- b. Lewana will present sponsorship levels and ideas at the September Board Meeting.
- c. The website is ready. Bob Pike videos will be posted on all communications methods.
- d. Walt is sending targeted emails promoting the conference.

Old Business

There was no Old Business

New Business

- a. Sententia is planning a Gamification Certification workshop in Tulsa November 6 and asked if we wanted to promote it. The board declined due to the proximity to the State Conference.

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3:30 p.m. to 5:00 p.m.

Action Items

- a. Upcoming board meetings will be:
- Monday, September 9 – 3:30 to 5:00 PM
 - Monday, October 7 – 3:30 to 5:00 PM
 - Monday, November 4 – 3:30 to 5:00 PM
 - Monday, December 2 – 3:30 to 5:00 PM

Adjournment

The meeting was adjourned at 5:17 p.m.

Respectfully submitted by Walt Hansmann, CPLP

ATD Tulsa VP of Membership Report for Board Meeting 8/5/19

1. **Decision Needed** by 8/8/19 - Asked by ATD National, to participate in ATD's Member Week taking place September 9-13 by discounting membership 10%. Application due 8/9/19.
2. **Membership Report** – In Progress. Reviewing last years report. Planning to use the same questions. Attached for your review.
 - a. Does anyone have feedback or additions?
3. **New Member Event** – 18 people registered as of 8/2. Working on networking activities.
 - a. **Feedback/Help Needed**
 - i. If you have any networking activities, please let me know. Planning to do about 2-3 activities.
 - ii. Will have 5 TPG people attend (not registered as of now). They will participate but more so be there to setup, cleanup, etc. Do they need to pay?
 - iii. Need 2-3 people from the board to help clean up after the event. May take 20mins. Let me know if you can.

Summary of Memberships as of 7/8/19

Membership Type	Number of Members
Student	3
Members	104
Total = 107	
Power Members (as of 8/2/19)	46 joint members out of 101 yielding a rate of 46%.

New Members Joined in July

Renewal Date	First Name	Last Name	Company	Email	Member Type
July 19, 2019	Kristyn	Diggins-Newport	CP Kelco	kristyn.diggins@cpkelco.com	ATD Tulsa Power Member
July 01, 2019	Megan	McManus	Self-Employed	mamcmanus@icloud.com	ATD Tulsa Student Associate Member Power Member

Members Renewed Since July

Renewal Date	First Name	Last Name	Company	Email	Member Type
June 30, 2019	Gary	Cathey	Tulsa City-County Library	gary.cathey@tulsalibrary.org	Power Member 6/30/2019
June 29, 2019	Kim	Boggs	Matrix Service Company	kimboggs63@gmail.com	Power Member 1/31/2020

ATD Tulsa VP of Membership Report for Board Meeting 8/5/19

July 31, 2019	Lisa	Espinosa	Hilti, Inc.	lisa.espinosa@hilti.com	ATD Tulsa Associate Member (Annual)
July 02, 2019	Bob	Mansur	Gateway Mortgage Group	bob.mansur@yahoo.com	ATD Tulsa Associate Member (Annual)
July 02, 2019	Steven	Oliver	Tulsa Community College	sdoliver39@cox.net	ATD Tulsa Associate Member (Annual)
July 19, 2019	Jaime	Vega	TTCU Federal Credit Union	jvega@ttcu.com	ATD Tulsa Student Associate Member (Annual)
July 24, 2019	Seth	Osborn	University of Oklahoma - National Resource Center for Youth Services	osbornseth@gmail.com	ATD Tulsa Associate Member (Annual)
July 25, 2019	Catheryn	Ackenhausen	CAP Tulsa	cackenhausen@captulsa.org	ATD Tulsa Associate Member (Annual)
July 31, 2019	Jill	Almond	Saint Francis Health System	jalmond8@cox.net	ATD Tulsa Power Member -

Lapsed Membership and Follow Up is Needed

Renewal Date	First Name	Last Name	Company	Email	Member Type
May 12, 2019	Greg	Kittinger	Approachable Leadership / Labor Relations Institute	gkittinger@lirms.com	Chapter
June 09, 2019	Candace	Byington	Paragon Films	candacebyington@gmail.com	Power Member 7/31/2019
June 21, 2019	Amie	Haar	OSU Foundation	ahaar@osugiving.com	Power Member 6/30/2019
June 08, 2019	Lewana	Harris	ONEOK	skymaxinc@yahoo.com	Power Member 4/30/2019
June 30, 2019	Bonnie	Stout	OSU Foundation	bstout@osugiving.com	Power Member 6/30/2019

ATD Tulsa VP of Membership Report for Board Meeting 8/5/19

June 30, 2019	Myra	Fanning	John Zink Institute/John Zink Co LLC	myra.fanning@johnzink.com	Power Member 2/28/2019
June 30, 2019	Paula	Ketron	theChurch.at	paulaketron@cox.net	Power Member 6/30/2019
June 30, 2019	Kristine	Sexter	WorkWise Productions and FindTrainKeep Great Employees	kristine@kristinesexter.com	Power Member 6/30/2019

Members Due for Renewal July 2019

Renewal Date	First Name	Last Name	Company	Email	Member Type
July 11, 2019	Dylan	McClure	The Persimmon Group	dylanmcclure@thepersimmongroup.com	ATD Tulsa Associate Member (Annual)
July 18, 2019	Rachelle	Day	CP Kelco	rachelle.day@cpkelco.com	ATD Tulsa Associate Member (Annual)

Members Due for Renewal August 2019

Renewal Date	First Name	Last Name	Company	Email	Member Type
August 04, 2019	Andrew	Engelbrecht	Whataburger	aengelbrec@wbhq.com	Chapter
August 10, 2019	Kara	Jones	Williams	kara.jones@williams.com	Chapter
August 11, 2019	Melissa	Fabian	Tulsa Tech	melissafabian@hotmail.com	Chapter
August 11, 2019	Teresa	McKay	TTCU Federal Credit Union	tmckay@ttcu.com	Power Member
August 13, 2019	Debbie	Butler	Oklahoma State University	debbie.butler@okstate.edu	Chapter
August 15, 2019	Steven	Kendall	MindFull Training. Events. Testing.	steve@mind-full.net	Chapter
August 20, 2019	Lynetria	Johnson	Tulsa Technology Center	lynetrieaj@gmail.com	Chapter
August 31, 2019	Kenneth	Baucum	SageNet	kbaucum@sagenet.com	Power Member
August 31, 2019	Jeni	Morrow	ONE GAS	jeni.morrow@onegas.com	Chapter
August 31, 2019	Bob	Schooley	Schooley & Associates	bschooley@schooleyandassociates.com	Power Member

ATD Tulsa VP of Membership Report for Board Meeting 8/5/19

August 31, 2019	Skip	Eller			National Membership Due
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Members Due for Renewal September 2019

Renewal Date	First Name	Last Name	Company	Email	Member Type
September 06, 2019	Cami	Cargnelutti	Student	cami.cargnelutti@verizon.net	Student
September 11, 2019	Brooks	Williamson	TD WILLIAMSON INC	brooks.williamson@tdwilliamson.com	Chapter
September 14, 2019	Luke	Freeman	PPG - Education Services	luke@harbingerleadership.com	Chapter
September 19, 2019	Mark	Mikluscak	Matrix Service Company	mmikluscak@matrixservicecompany.com	Power Member
September 20, 2019	Candace	Nees	Williams	candace.jones@cox.net	Chapter
September 21, 2019	Allison	Gonzalez	Hilti	allison.gonzalez@hilti.com	Chapter
September 21, 2019	Elita	Amanuel	Hilti	elita.amanuel@hilti.com	Chapter
September 21, 2019	Nena	McFadden-Welton	Matrix Service Company	nmcfadden@matrixservicecompany.com	Chapter
September 27, 2019	Bev	Taulman	Matrix Service Company	btaulman@matrixservicecompany.com	Power Member
September 27, 2019	Laurie	Rosenbaum	ONE Gas	laurie.rosenbaum@onegas.com	Power Member
September 30, 2019	Sunilyn	Hertt	Tulsa County	shertt@tulsacounty.org	Power Member

Members Due for Renewal October 2019

Renewal Date	First Name	Last Name	Company	Email	Member Type
October 05, 2019	Sarah	Coccaro	Avis Budget Group	sarah.coccaro@icloud.com	ATD Tulsa Associate Member (Annual)
October 13, 2019	Jill	Dickerson	State National Companies	jdickerson@statenational.com	ATD Tulsa Power Member -
October 11, 2019	Savannah	Haddock	Tulsa County	shaddock@tulsacounty.org	ATD Tulsa Associate Member (Annual)
October 09, 2019	Olivia	Williams	Nuehealth	fwilliams@nuehealth.com	ATD Tulsa Associate Member (Annual)

ATD Tulsa VP of Membership Report for Board Meeting 8/5/19

October 31, 2019	Kristin	Wise	Explorer Pipelin	kwise@expl.com	ATD Tulsa Power Member -
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Members Due for Renewal November 2019

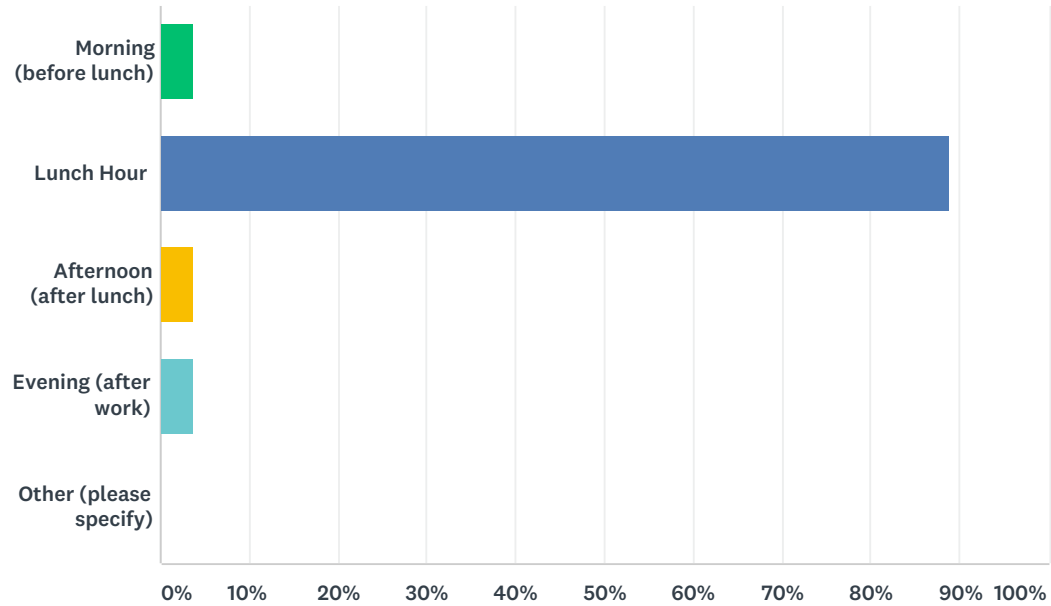
Renewal Date	First Name	Last Name	Company	Email	Member Type
November 26, 2019	Meagan	Medina	Finance of America Reverse	mmedina@financeofamerica.com	ATD Tulsa Power Member -

Members Due for Renewal December 2019

Renewal Date	First Name	Last Name	Company	Email	Member Type
December 13, 2019	Tracie	Gregory	TTCU Federal Credit Union	tgregory@ttcu.com	ATD Tulsa Power Member -
December 31, 2019	Kristal	Nicholson	OU National Resource Center for Youth Services	kristalnicholson@hotmail.com	ATD Tulsa Associate Member (Annual)
December 31, 2019	Kristine	Stevens	Pegasystems	kristine.stevens@pega.com	ATD Tulsa Power Member
December 05, 2019	Matthew	Tedesucci	TTCU Federal Credit Union	mtedesucci@ttcu.com	ATD Tulsa Associate Member (Annual)

Q1 What time of day works best for you for the monthly Chapter Program Meetings?

Answered: 27 Skipped: 0

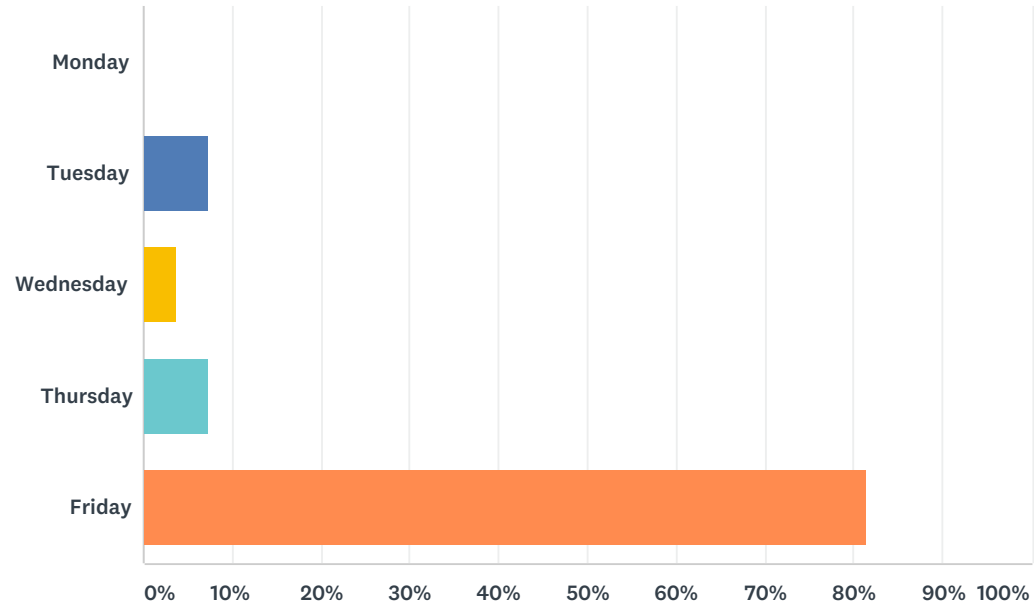


ANSWER CHOICES	RESPONSES	
Morning (before lunch)	3.70%	1
Lunch Hour	88.89%	24
Afternoon (after lunch)	3.70%	1
Evening (after work)	3.70%	1
Other (please specify)	0.00%	0
TOTAL		27

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

Q2 What day of the week works best for you for the monthly Chapter Program Meetings?

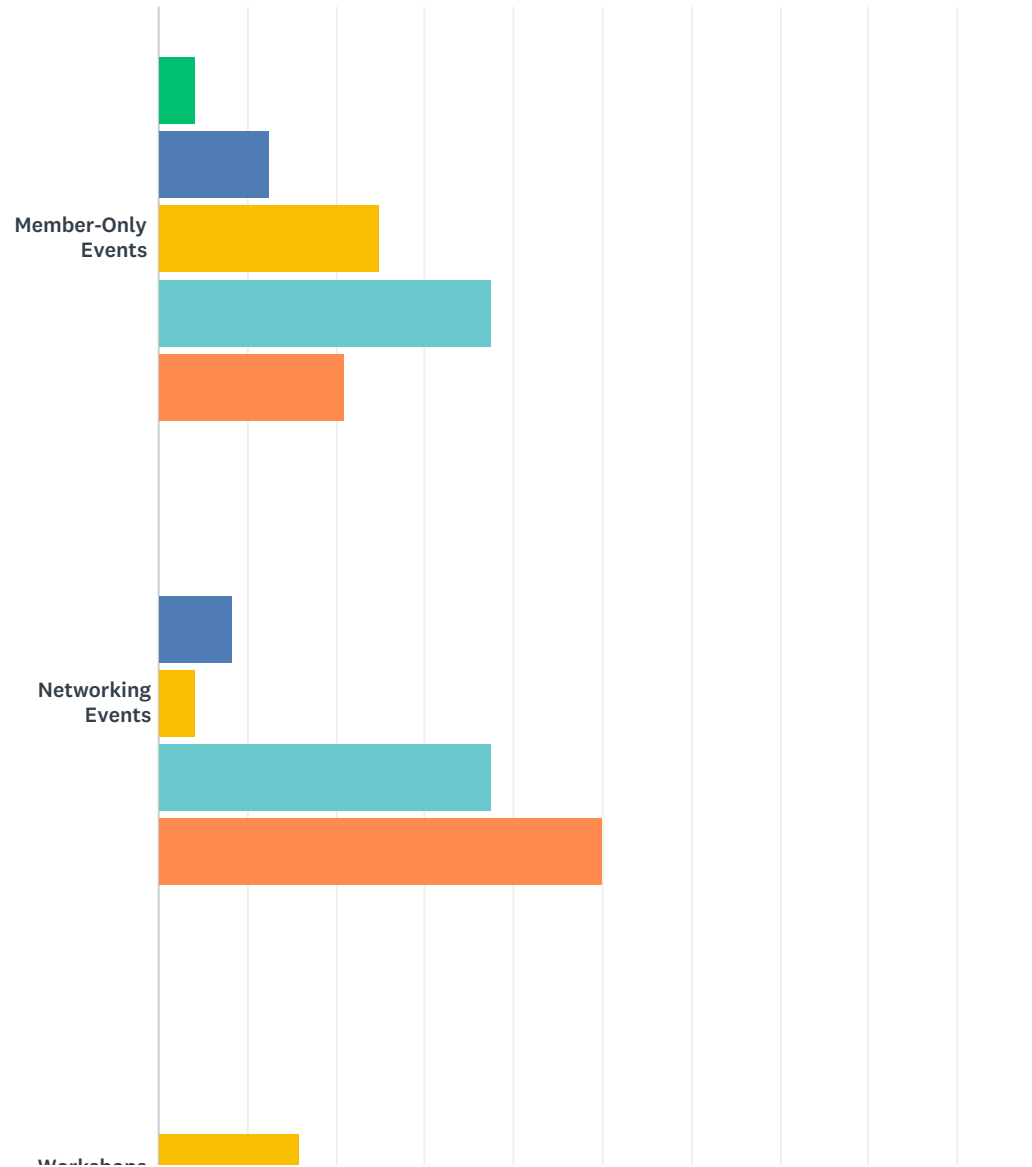
Answered: 27 Skipped: 0



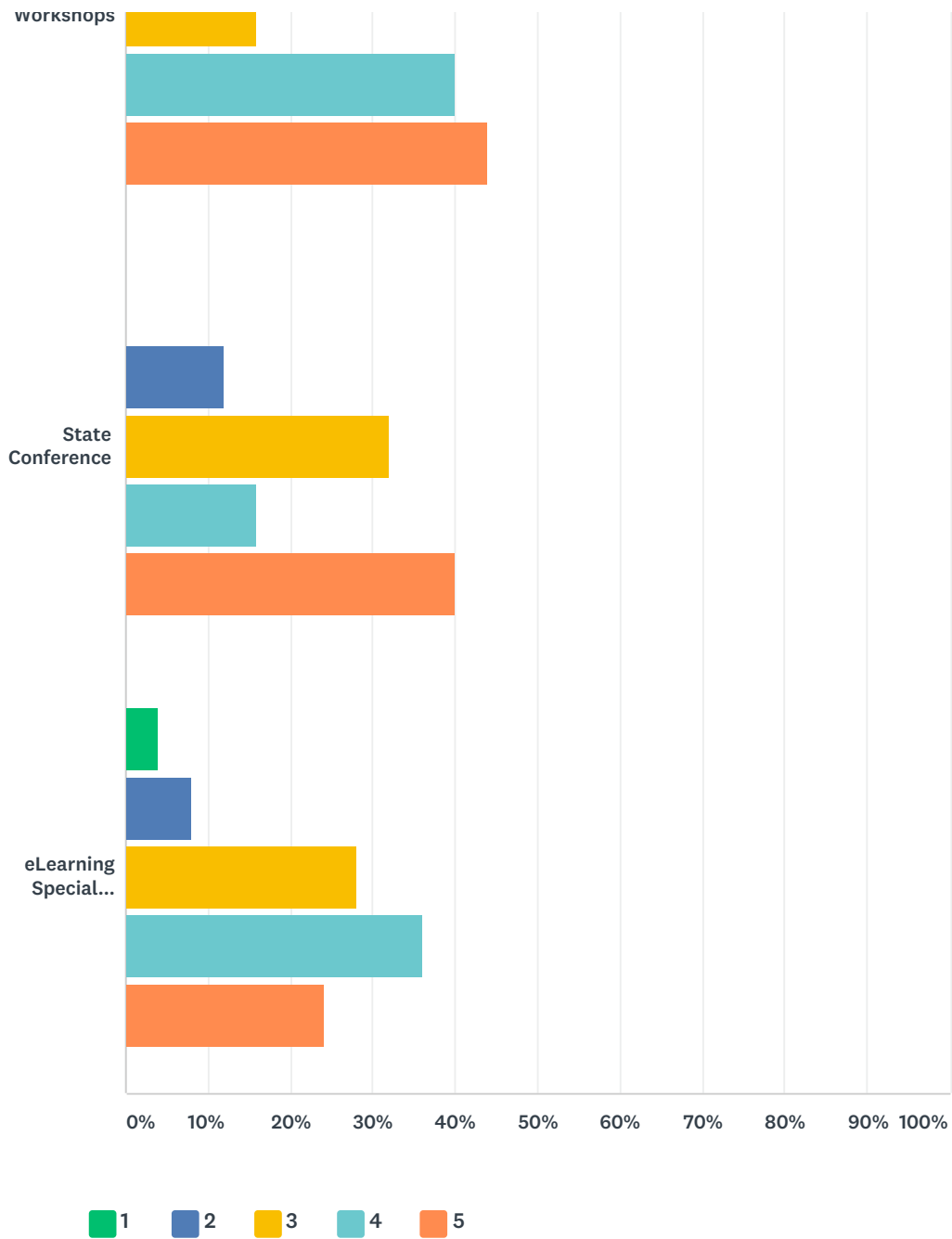
ANSWER CHOICES	RESPONSES
Monday	0.00% 0
Tuesday	7.41% 2
Wednesday	3.70% 1
Thursday	7.41% 2
Friday	81.48% 22
TOTAL	27

Q3 How valuable do you find the following professional development offerings? Use the scale to determine the value 1 (not at all valuable) to 5 (extremely valuable).

Answered: 26 Skipped: 1



ATD Tulsa Annual Membership Survey 2018



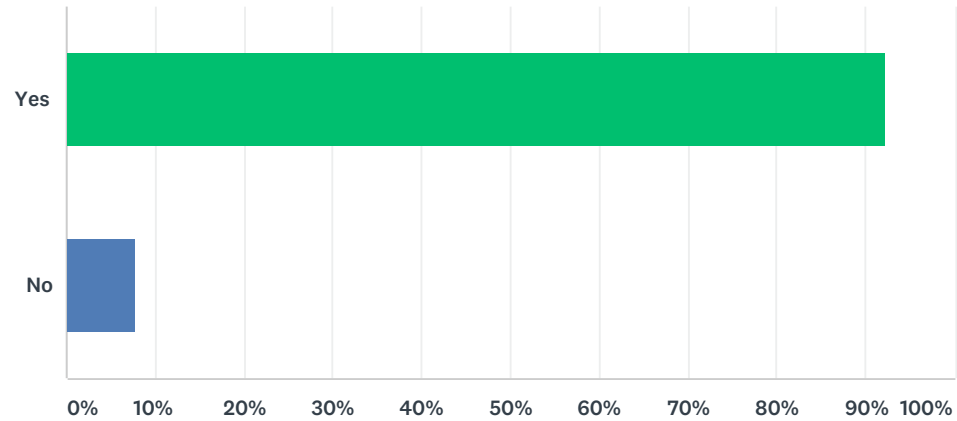
	1	2	3	4	5	TOTAL
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ATD Tulsa Annual Membership Survey 2018

Member-Only Events	4.17% 1	12.50% 3	25.00% 6	37.50% 9	20.83% 5	24
Networking Events	0.00% 0	8.33% 2	4.17% 1	37.50% 9	50.00% 12	24
Workshops	0.00% 0	0.00% 0	16.00% 4	40.00% 10	44.00% 11	25
State Conference	0.00% 0	12.00% 3	32.00% 8	16.00% 4	40.00% 10	25
eLearning Special Interest Group (Quarterly Meetings)	4.00% 1	8.00% 2	28.00% 7	36.00% 9	24.00% 6	25

Q4 Are you aware that you can now pay for your ATD (International) and ATD Tulsa memberships at the same time using the ATD Store at <https://checkout.td.org/membership> (ATD + ATD Tulsa) and <https://www.td.org/chapter-locator> (ATD Tulsa only)?

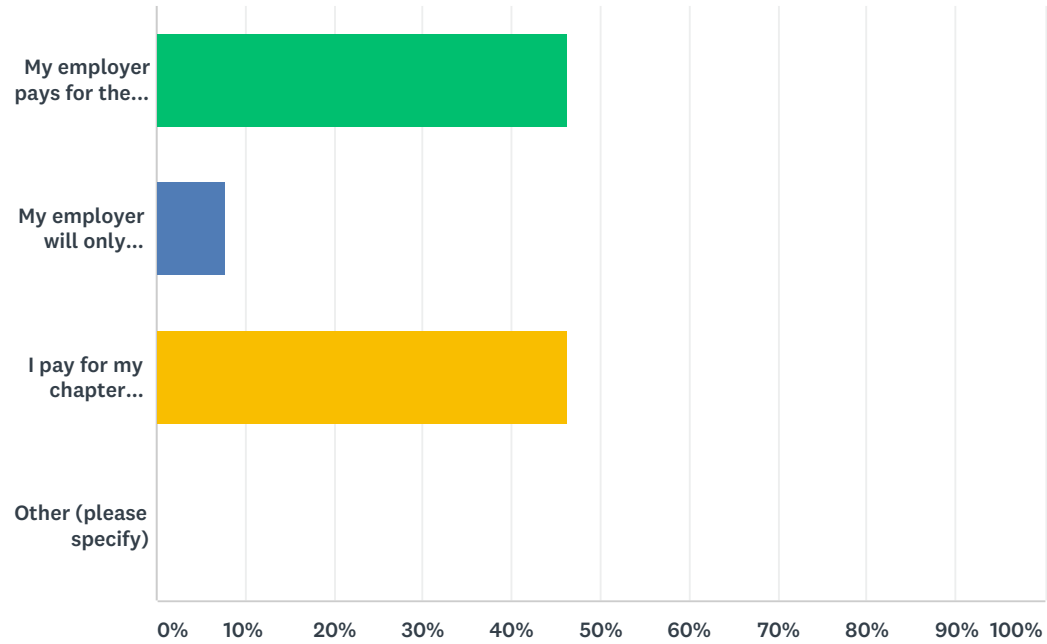
Answered: 26 Skipped: 1



ANSWER CHOICES	RESPONSES	
Yes	92.31%	24
No	7.69%	2
TOTAL		26

Q5 Who pays for your ATD Tulsa Chapter membership?

Answered: 26 Skipped: 1

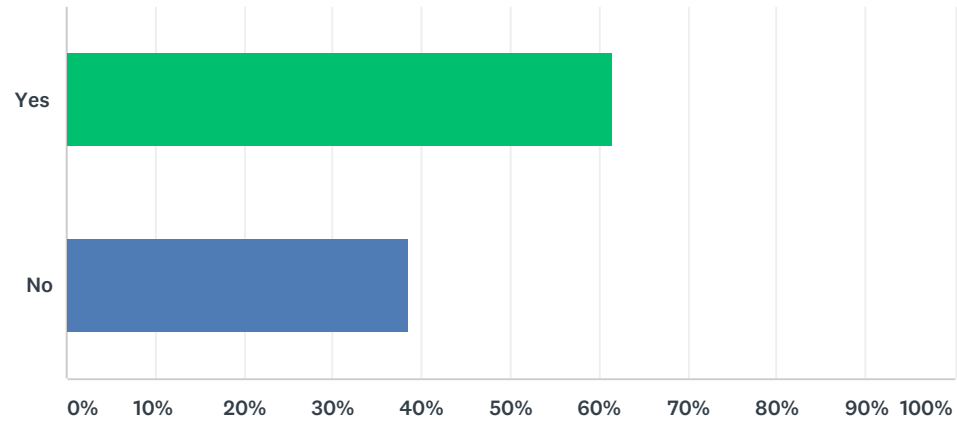


ANSWER CHOICES	RESPONSES
My employer pays for the membership on my behalf.	46.15% 12
My employer will only reimburse me after I pay for the membership myself.	7.69% 2
I pay for my chapter membership myself from personal funds.	46.15% 12
Other (please specify)	0.00% 0
TOTAL	26

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

Q6 Are you aware of ATD Tulsa’s Chapter Incentive Program (CHIP code) 7015, when purchasing items through the ATD Store at <https://www.td.org/store>?

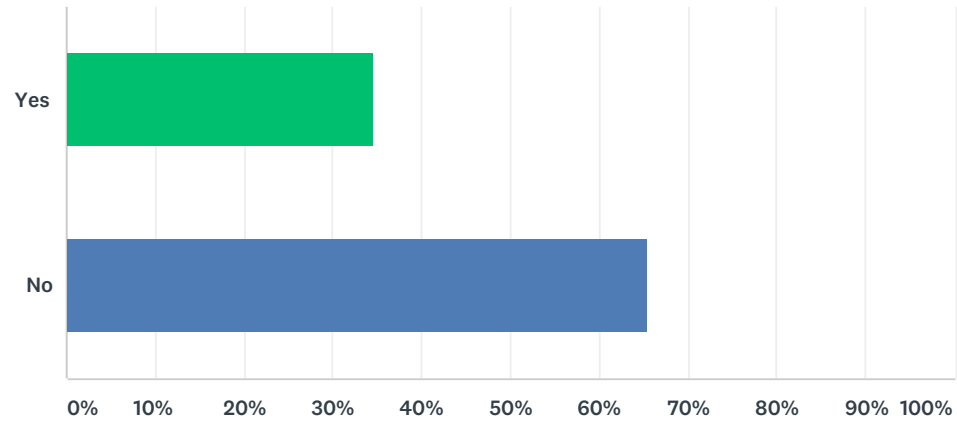
Answered: 26 Skipped: 1



ANSWER CHOICES	RESPONSES	
Yes	61.54%	16
No	38.46%	10
TOTAL		26

Q7 Have you used ATD Tulsa's CHIP code – 7015 - when making purchases in the ATD Store at <https://www.td.org/store>?

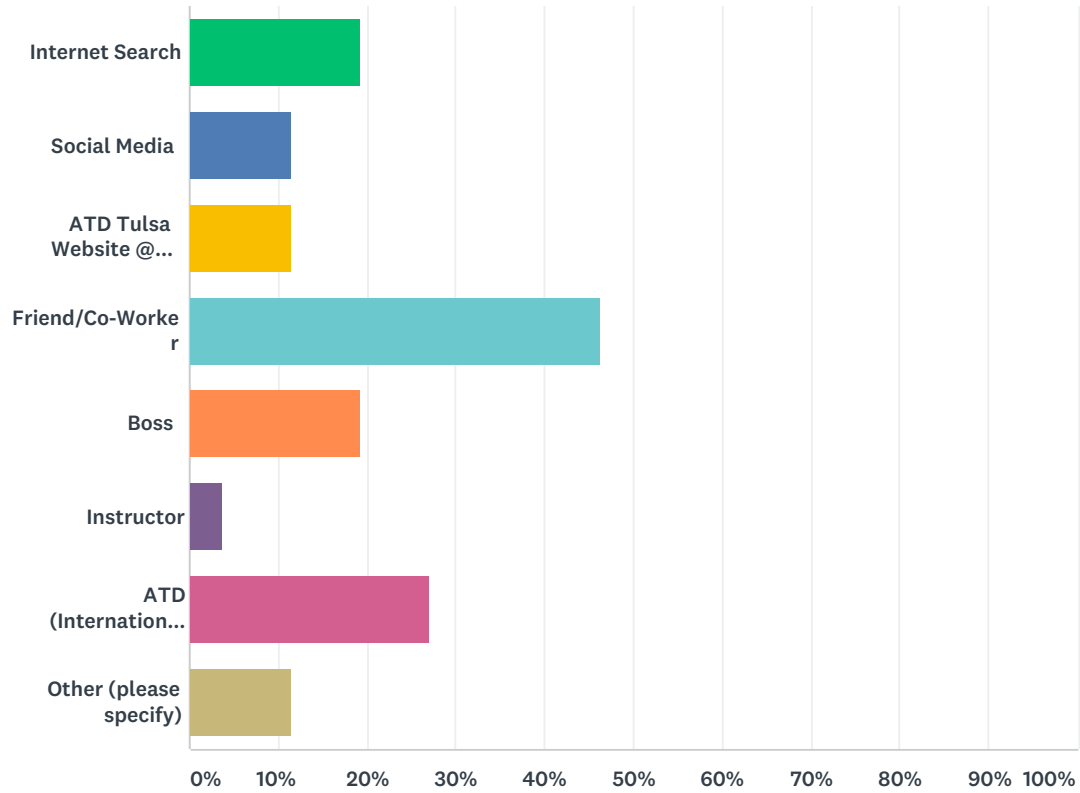
Answered: 26 Skipped: 1



ANSWER CHOICES	RESPONSES	
Yes	34.62%	9
No	65.38%	17
TOTAL		26

Q8 How did you find out about ATD Tulsa? Select all that apply.

Answered: 26 Skipped: 1



ANSWER CHOICES	RESPONSES	
Internet Search	19.23%	5
Social Media	11.54%	3
ATD Tulsa Website @ https://tdtulsa.org/	11.54%	3
Friend/Co-Worker	46.15%	12
Boss	19.23%	5

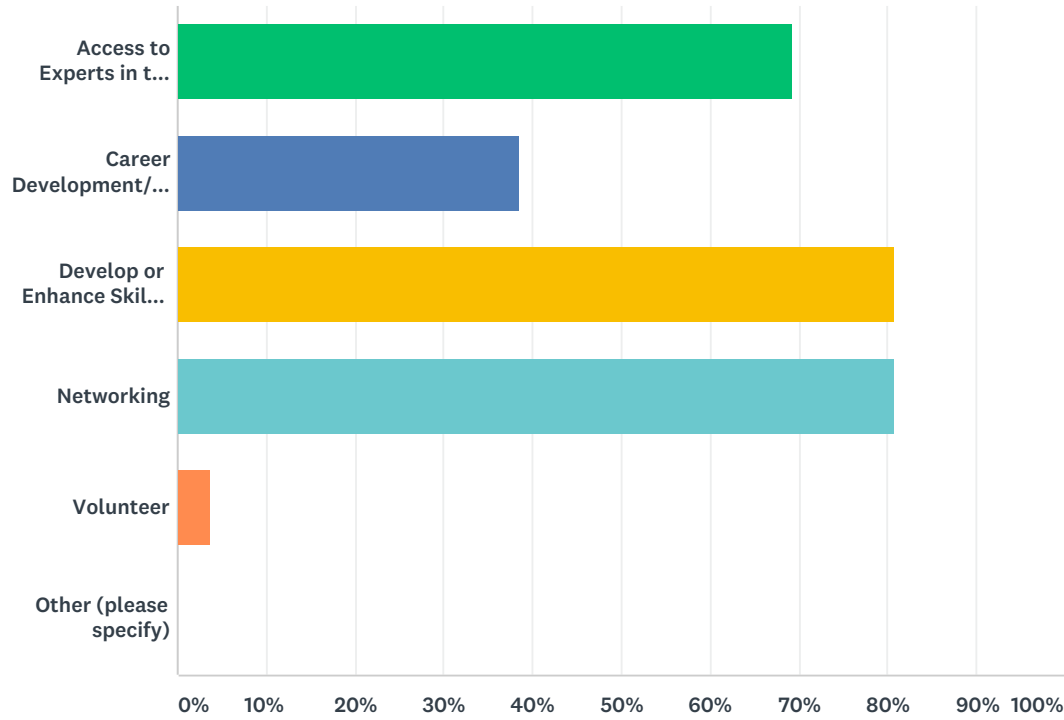
ATD Tulsa Annual Membership Survey 2018

Instructor	3.85%	1
ATD (International)/ATD (International) Website @ https://www.td.org/	26.92%	7
Other (please specify)	11.54%	3
Total Respondents: 26		

#	OTHER (PLEASE SPECIFY)	DATE
1	I was a member many years ago. Current member, Myra Fanning, encouraged me to renew and comeback.	9/21/2018 6:33 PM
2	A member recommended it	9/21/2018 3:24 PM
3	Recommendation from Protocol School of Washington when I received my training from them in 2006	9/21/2018 9:44 AM

Q9 Why did you initially join ATD Tulsa? Select all that apply.

Answered: 26 Skipped: 1



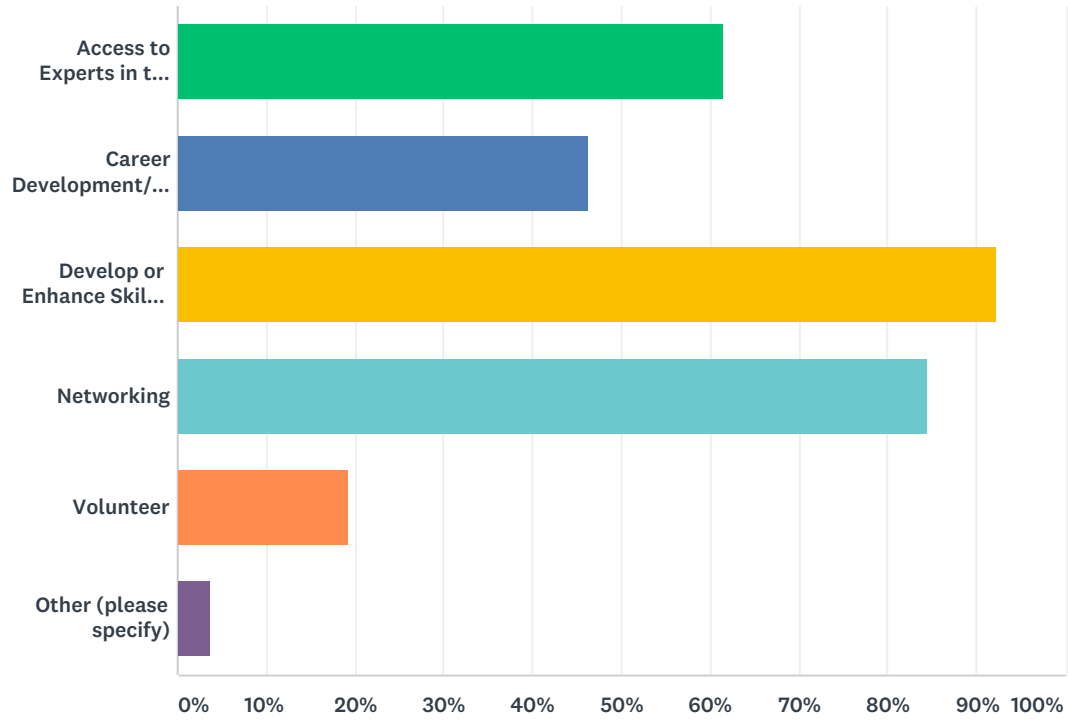
ANSWER CHOICES	RESPONSES	
Access to Experts in the Field	69.23%	18
Career Development/Find a Job	38.46%	10
Develop or Enhance Skills and Knowledge	80.77%	21
Networking	80.77%	21
Volunteer	3.85%	1
Other (please specify)	0.00%	0
Total Respondents: 26		

ATD Tulsa Annual Membership Survey 2018

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

Q10 Why have you stayed a member of ATD Tulsa? Select all that apply.

Answered: 26 Skipped: 1



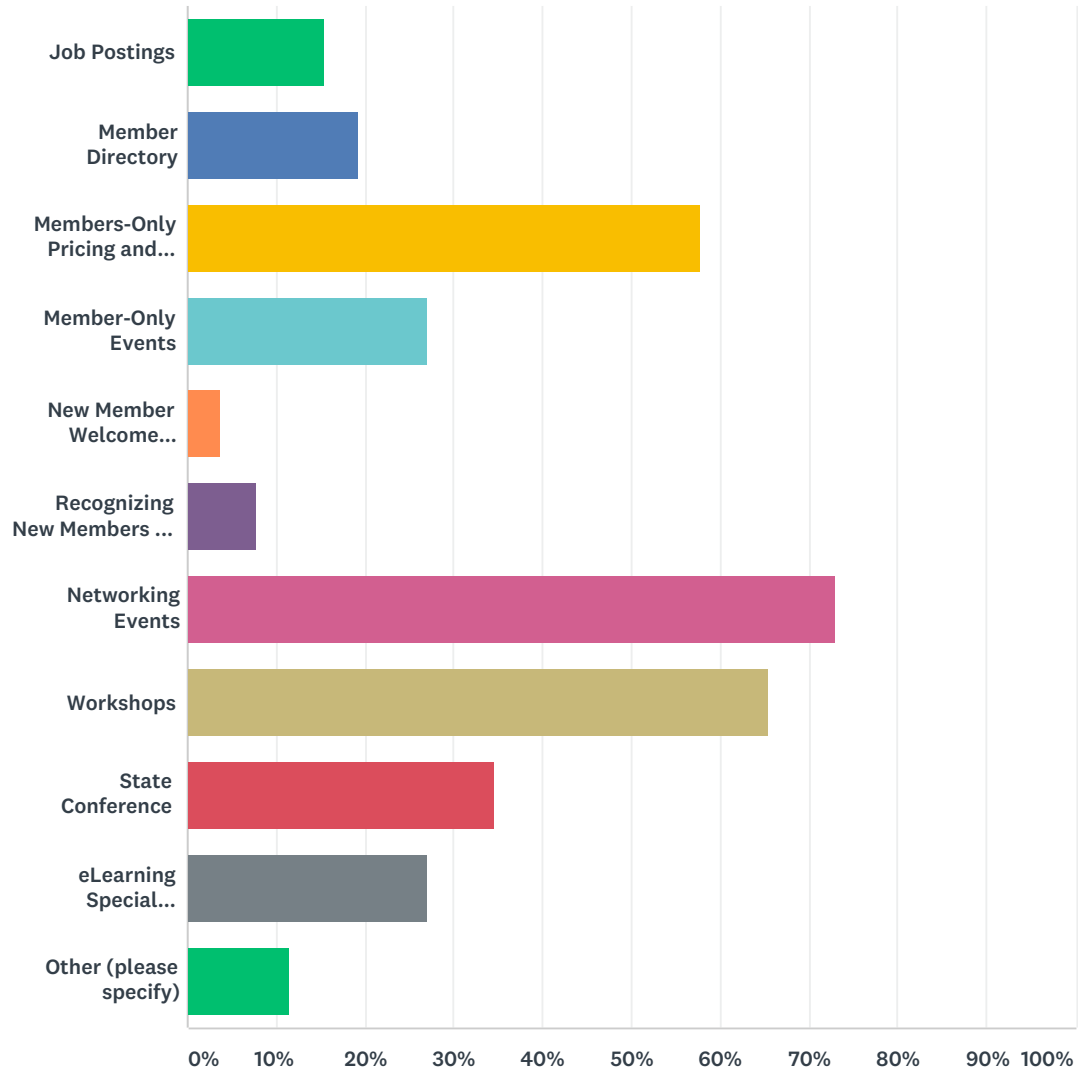
ANSWER CHOICES	RESPONSES	
Access to Experts in the Field	61.54%	16
Career Development/Find a Job	46.15%	12
Develop or Enhance Skills and Knowledge	92.31%	24
Networking	84.62%	22
Volunteer	19.23%	5
Other (please specify)	3.85%	1
Total Respondents: 26		

ATD Tulsa Annual Membership Survey 2018

#	OTHER (PLEASE SPECIFY)	DATE
1	Manager request	9/17/2018 9:00 AM

Q11 Check the 4 membership benefits which you find have the most value.

Answered: 26 Skipped: 1



ANSWER CHOICES

RESPONSES

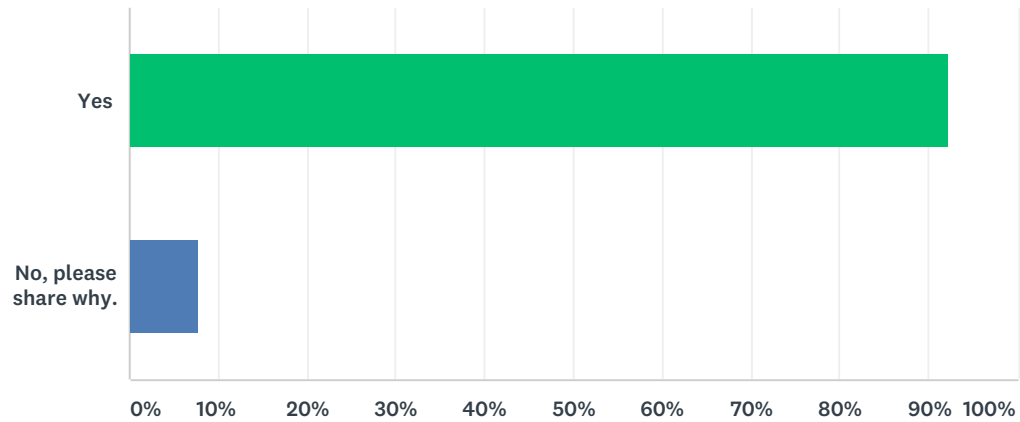
ATD Tulsa Annual Membership Survey 2018

Job Postings	15.38%	4
Member Directory	19.23%	5
Members-Only Pricing and Discounts	57.69%	15
Member-Only Events	26.92%	7
New Member Welcome Luncheon	3.85%	1
Recognizing New Members and Power Members at each monthly Chapter Program Meeting	7.69%	2
Networking Events	73.08%	19
Workshops	65.38%	17
State Conference	34.62%	9
eLearning Special Interest Group (Quarterly Meetings)	26.92%	7
Other (please specify)	11.54%	3
Total Respondents: 26		

#	OTHER (PLEASE SPECIFY)	DATE
1	Chapter meeting learning	9/26/2018 10:18 PM
2	Development and enhancement of skills as a professional trainer	9/21/2018 6:33 PM
3	monthly meetings	9/14/2018 8:33 PM

Q12 Are you satisfied with the member benefits provided to you by ATD Tulsa Chapter? If you answered No, please share why you answered that way. (Yes/No with optional comment)

Answered: 26 Skipped: 1



ANSWER CHOICES	RESPONSES	
Yes	92.31%	24
No, please share why.	7.69%	2
TOTAL		26

#	NO, PLEASE SHARE WHY.	DATE
1	I don't remember a networking event this year.	9/21/2018 9:34 AM
2	Maybe it's the events that I've attended but they don't seem lacking in content. I find a lot of the same topics, and conversation as I have in the past versus a higher level of learning on a topic. Maybe offering some entry, mid and high level of learning would help others further develop skills they already have.	9/17/2018 9:00 AM

Q13 What membership benefits would you like to see changed and/or added?

Answered: 26 Skipped: 1

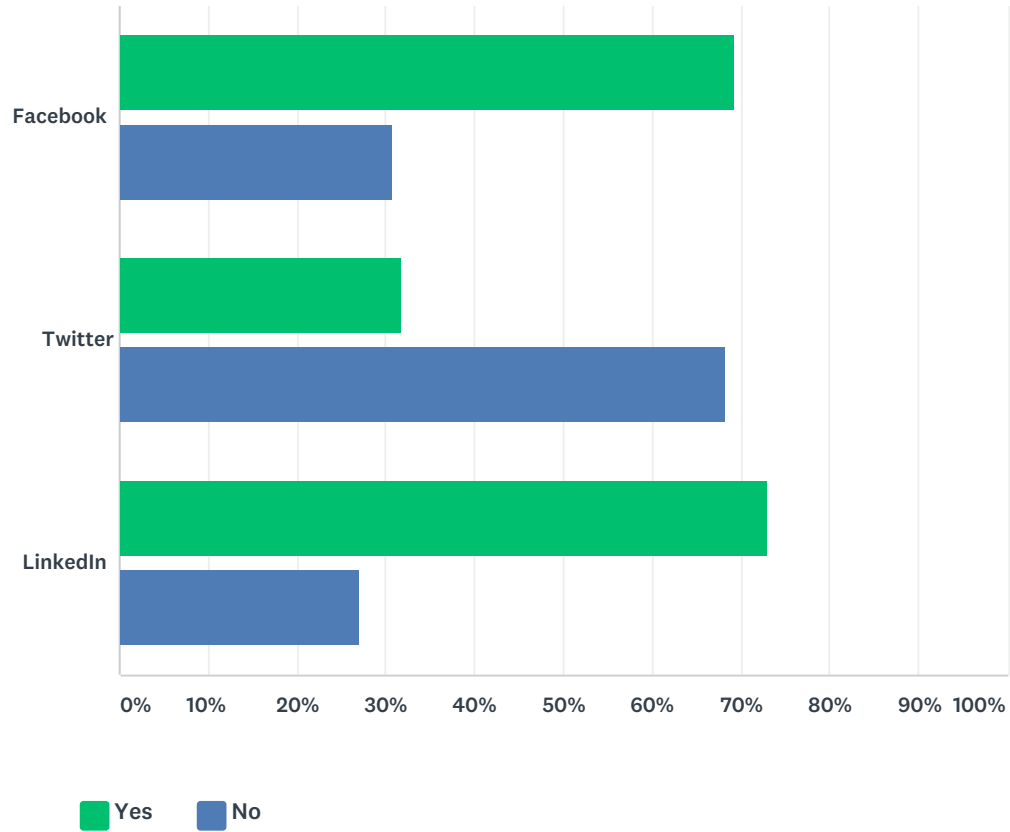
#	RESPONSES	DATE
1	none	9/26/2018 10:18 PM
2	None	9/25/2018 5:17 PM
3	The most vital aspect of membership for me is to garner powerful tools from meeting speakers.	9/21/2018 6:33 PM
4	i'm satisfied with the benefits as they are	9/21/2018 3:24 PM
5	None	9/21/2018 10:34 AM
6	Can't think of any at the moment	9/21/2018 10:15 AM
7	Not sure	9/21/2018 9:49 AM
8	If national organization would consider reduced membership fee that would be more cost effective for those of us who run our own small business and pay for it out of our own pocket.	9/21/2018 9:44 AM
9	None	9/21/2018 9:42 AM
10	.	9/21/2018 9:34 AM
11	More networking events.	9/21/2018 9:29 AM
12	Unknown	9/20/2018 6:52 PM
13	--	9/20/2018 9:24 AM
14	I am a new member so I have not experienced all of the membership benefits.	9/18/2018 1:31 PM
15	n/a	9/18/2018 10:18 AM
16	See 12.	9/17/2018 9:00 AM
17	Member-only roundtables on rotating topics. Similar to a SIG.	9/16/2018 3:07 PM
18	None	9/15/2018 3:16 AM
19	N/A	9/14/2018 8:33 PM
20	NONE	9/14/2018 8:22 PM
21	I wish there was a membership level where you could pay for meetings and membership all in one lump sum. For our team it is not the best use of time administratively to reimburse us such a small amount every month. Would be a nice option.	9/14/2018 4:13 PM
22	Not sure	9/14/2018 2:49 PM

ATD Tulsa Annual Membership Survey 2018

23	na	9/14/2018 10:10 AM
24	More networking opportunities	9/14/2018 10:03 AM
25	Our job listings page for Tulsa is usually pretty bare - it'd be nice if there were a better effort to list training-related jobs in Tulsa and surrounding areas. Also, I would love to present at a monthly meeting but I find the application process is just too lengthy/in-depth.	9/14/2018 9:57 AM
26	none that I can think of	9/14/2018 9:49 AM

Q14 Are you following ATD Tulsa on any of the following platforms:

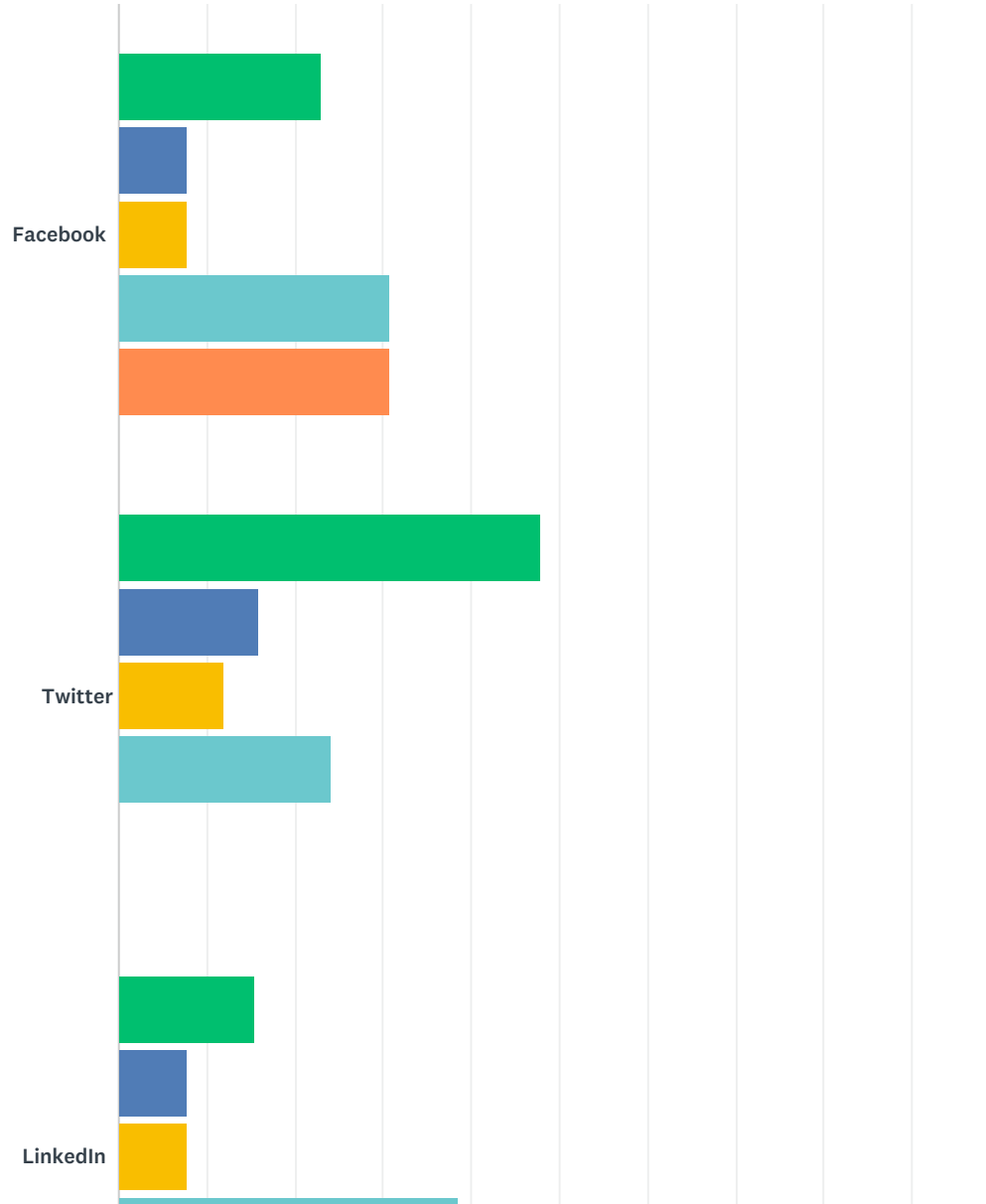
Answered: 26 Skipped: 1



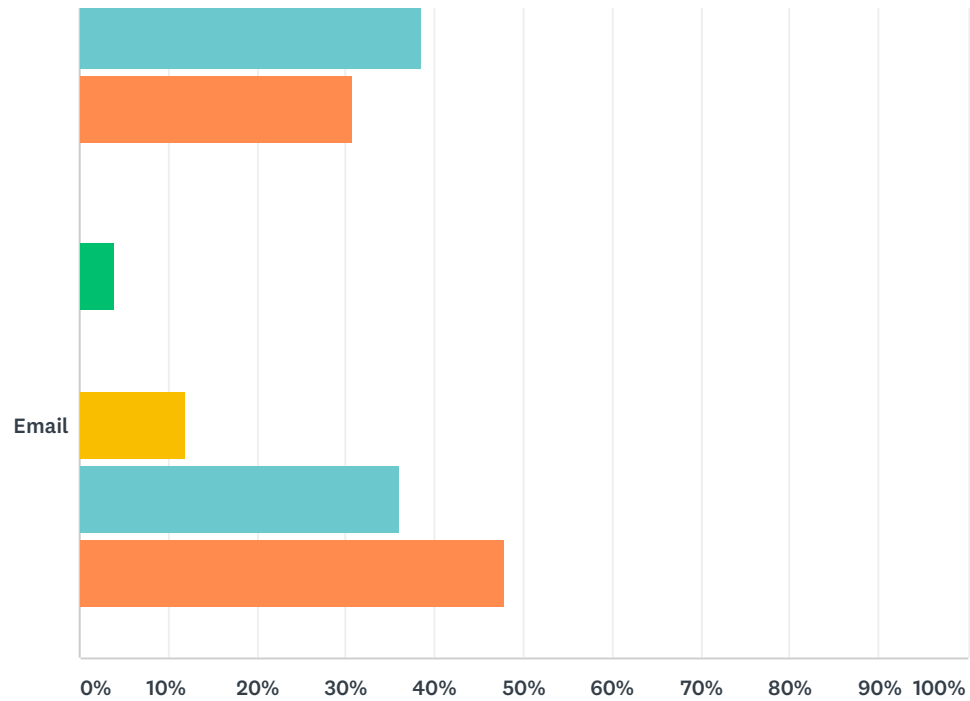
	YES	NO	TOTAL
Facebook	69.23% 18	30.77% 8	26
Twitter	31.82% 7	68.18% 15	22
LinkedIn	73.08% 19	26.92% 7	26

Q15 How likely are you to interact with ATD Tulsa via the following platforms?:

Answered: 26 Skipped: 1



ATD Tulsa Annual Membership Survey 2018

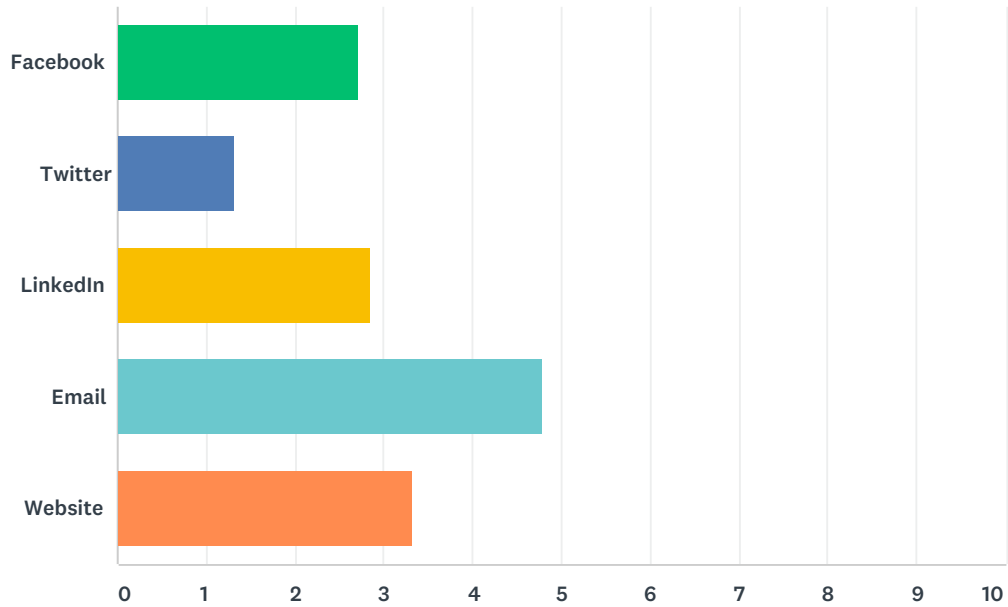


■ Very unlikely
 ■ Unlikely
 ■ Neither likely nor unlikely
 ■ Likely
■ Very likely

	VERY UNLIKELY	UNLIKELY	NEITHER LIKELY NOR UNLIKELY	LIKELY	VERY LIKELY	TOTAL	
Facebook	23.08% 6	7.69% 2		7.69% 2	30.77% 8	30.77% 8	26
Twitter	48.00% 12	16.00% 4		12.00% 3	24.00% 6	0.00% 0	25
LinkedIn	15.38% 4	7.69% 2		7.69% 2	38.46% 10	30.77% 8	26
Email	4.00% 1	0.00% 0		12.00% 3	36.00% 9	48.00% 12	25

Q16 What are your preferred methods for receiving information from ATD Tulsa? Please rank in the ordered preferred.

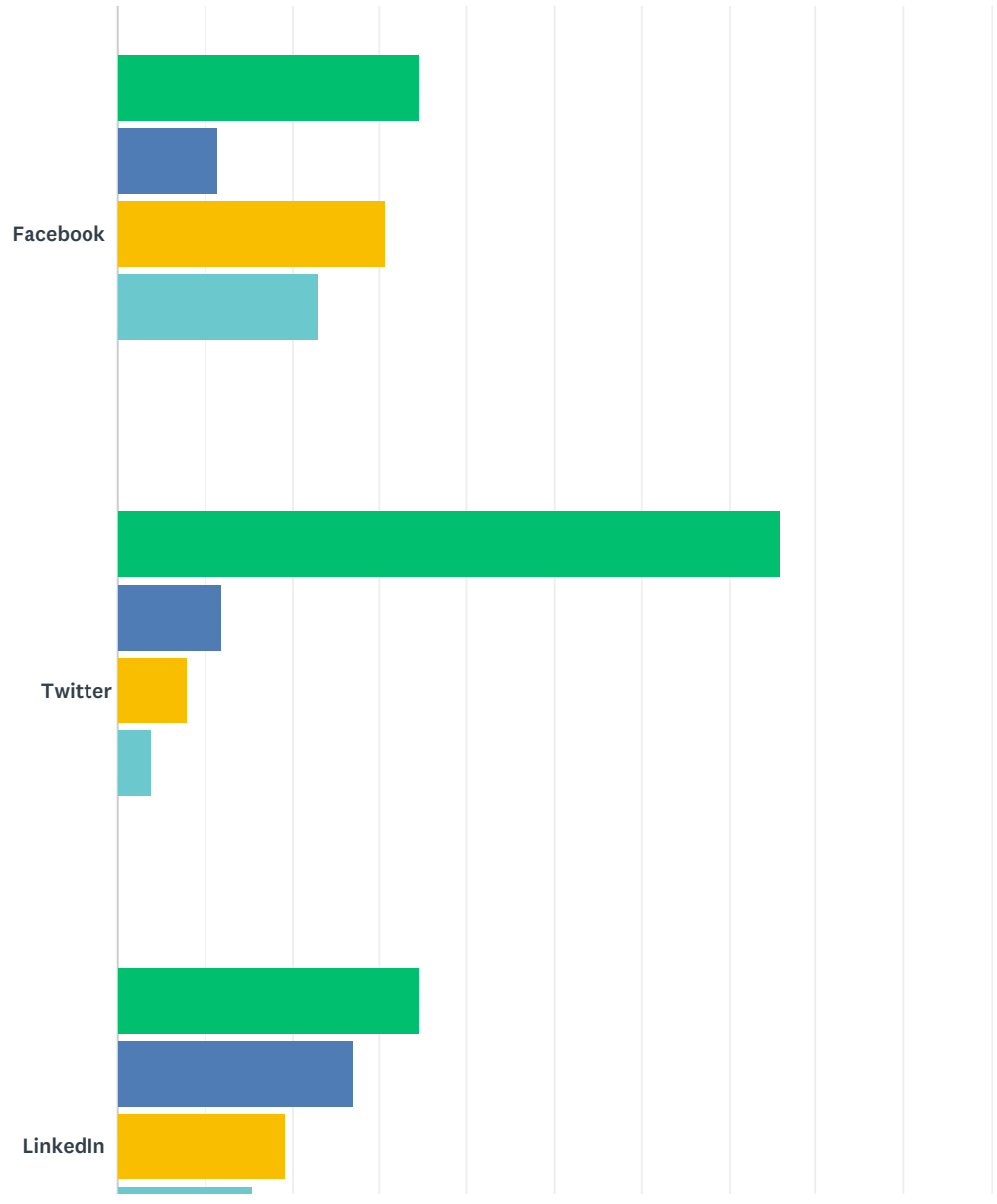
Answered: 25 Skipped: 2



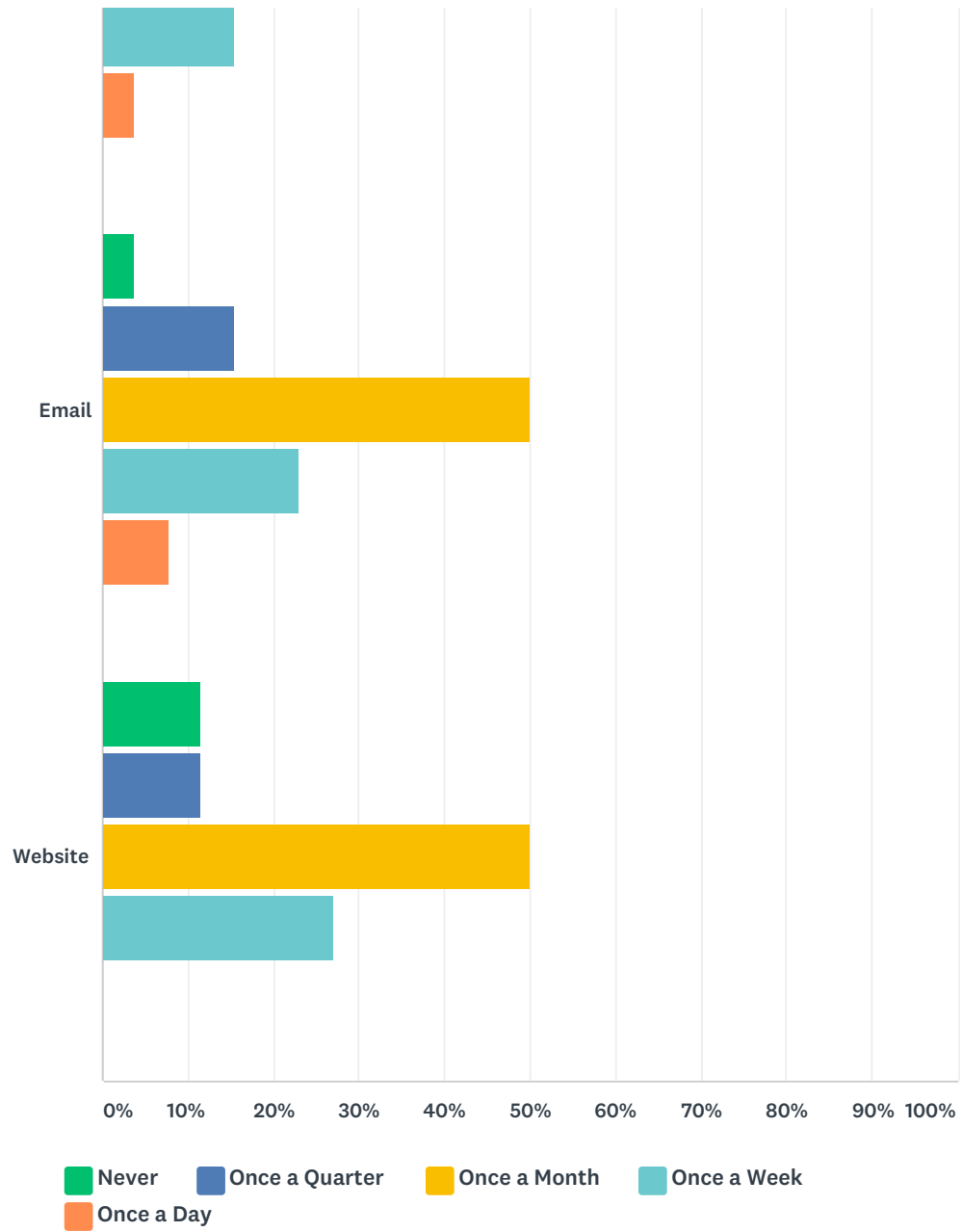
	1	2	3	4	5	TOTAL	SCORE
Facebook	8.00% 2	16.00% 4	24.00% 6	44.00% 11	8.00% 2	25	2.72
Twitter	0.00% 0	4.00% 1	4.00% 1	12.00% 3	80.00% 20	25	1.32
LinkedIn	4.00% 1	12.00% 3	56.00% 14	20.00% 5	8.00% 2	25	2.84
Email	80.00% 20	20.00% 5	0.00% 0	0.00% 0	0.00% 0	25	4.80
Website	8.00% 2	48.00% 12	16.00% 4	24.00% 6	4.00% 1	25	3.32

Q17 How often do you interact with ATD Tulsa through the following communication methods?

Answered: 26 Skipped: 1



ATD Tulsa Annual Membership Survey 2018



NEVER	ONCE A QUARTER	ONCE A MONTH	ONCE A WEEK	ONCE A DAY	TOTAL
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ATD Tulsa Annual Membership Survey 2018

Facebook	34.62% 9	11.54% 3	30.77% 8	23.08% 6	0.00% 0	26
Twitter	76.00% 19	12.00% 3	8.00% 2	4.00% 1	0.00% 0	25
LinkedIn	34.62% 9	26.92% 7	19.23% 5	15.38% 4	3.85% 1	26
Email	3.85% 1	15.38% 4	50.00% 13	23.08% 6	7.69% 2	26
Website	11.54% 3	11.54% 3	50.00% 13	26.92% 7	0.00% 0	26

Q18 What is your home zip code?

Answered: 26 Skipped: 1

#	RESPONSES	DATE
1	74114	9/26/2018 10:27 PM
2	74012	9/25/2018 5:19 PM
3	74133	9/21/2018 6:35 PM
4	74105	9/21/2018 3:26 PM
5	74132	9/21/2018 10:45 AM
6	74106	9/21/2018 10:36 AM
7	74137	9/21/2018 10:17 AM
8	74008	9/21/2018 9:51 AM
9	74014	9/21/2018 9:50 AM
10	74037	9/21/2018 9:44 AM
11	.	9/21/2018 9:37 AM
12	74137	9/21/2018 9:30 AM
13	74012	9/21/2018 9:23 AM
14	74014	9/20/2018 6:55 PM
15	74074	9/18/2018 1:34 PM
16	74055	9/18/2018 10:20 AM
17	74134	9/17/2018 9:02 AM
18	74112	9/16/2018 3:09 PM
19	74104	9/15/2018 3:18 AM
20	74037	9/14/2018 8:36 PM
21	74011	9/14/2018 8:26 PM
22	74075	9/14/2018 4:17 PM
23	74133	9/14/2018 2:51 PM
24	74029	9/14/2018 10:13 AM

ATD Tulsa Annual Membership Survey 2018

25	74066	9/14/2018 10:06 AM
26	74008	9/14/2018 9:51 AM

Q19 What is your work zip code?

Answered: 26 Skipped: 1

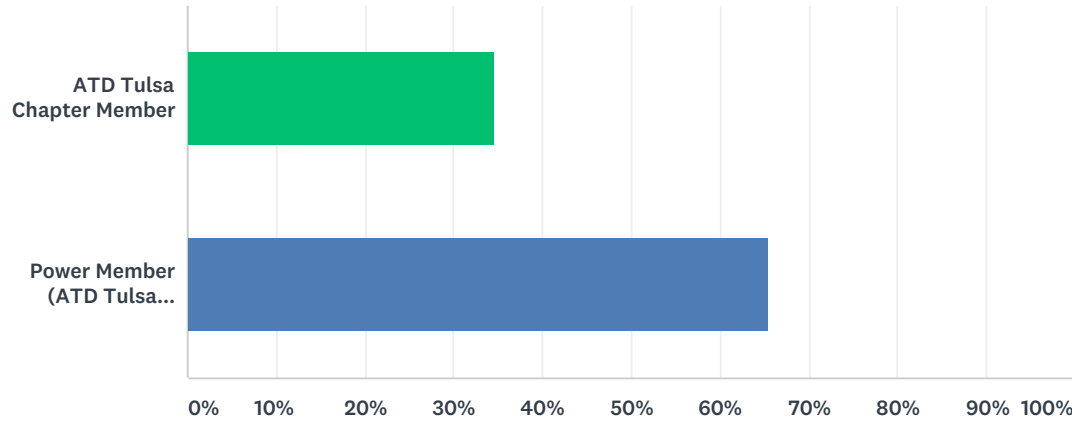
#	RESPONSES	DATE
1	74114	9/26/2018 10:27 PM
2	74104	9/25/2018 5:19 PM
3	74133	9/21/2018 6:35 PM
4	74135	9/21/2018 3:26 PM
5	74103	9/21/2018 10:45 AM
6	74106	9/21/2018 10:36 AM
7	74146	9/21/2018 10:17 AM
8	74008	9/21/2018 9:51 AM
9	74133	9/21/2018 9:50 AM
10	74172	9/21/2018 9:44 AM
11	.	9/21/2018 9:37 AM
12	74146	9/21/2018 9:30 AM
13	76021	9/21/2018 9:23 AM
14	74014	9/20/2018 6:55 PM
15	74074	9/18/2018 1:34 PM
16	74116	9/18/2018 10:20 AM
17	74135	9/17/2018 9:02 AM
18	74112	9/16/2018 3:09 PM
19	74033	9/15/2018 3:18 AM
20	74037	9/14/2018 8:36 PM
21	74012	9/14/2018 8:26 PM
22	74078	9/14/2018 4:17 PM
23	74135	9/14/2018 2:51 PM
24	74003	9/14/2018 10:13 AM

ATD Tulsa Annual Membership Survey 2018

25	74120	9/14/2018 10:06 AM
26	74012	9/14/2018 9:51 AM

Q20 What is your level of membership within ATD?

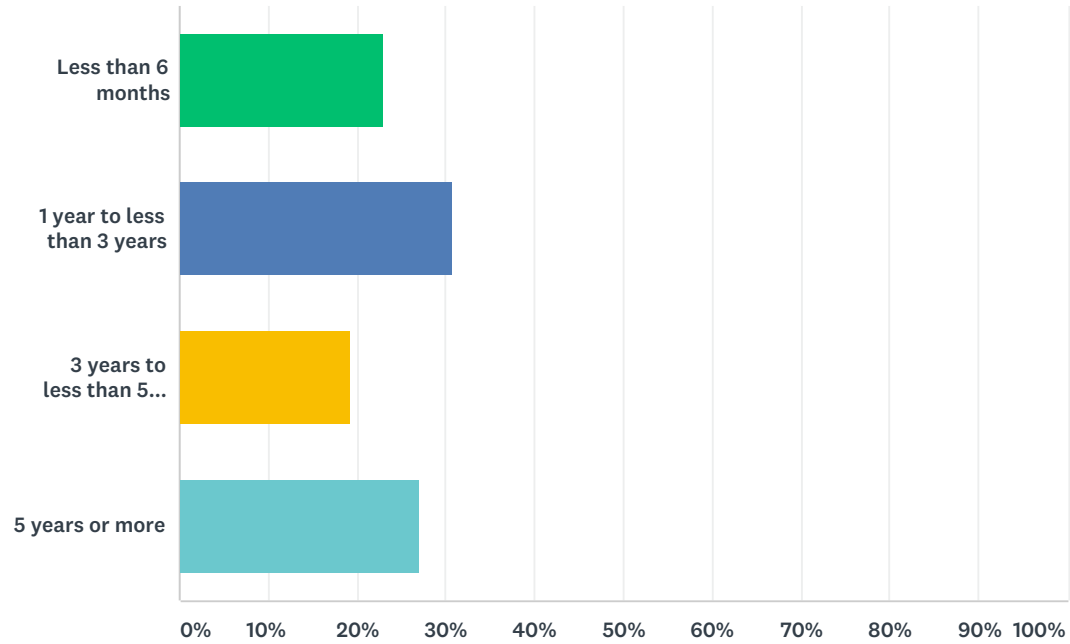
Answered: 26 Skipped: 1



ANSWER CHOICES	RESPONSES	
ATD Tulsa Chapter Member	34.62%	9
Power Member (ATD Tulsa Chapter + ATD Member)	65.38%	17
TOTAL		26

Q21 How long have you been an ATD Tulsa Chapter member?

Answered: 26 Skipped: 1

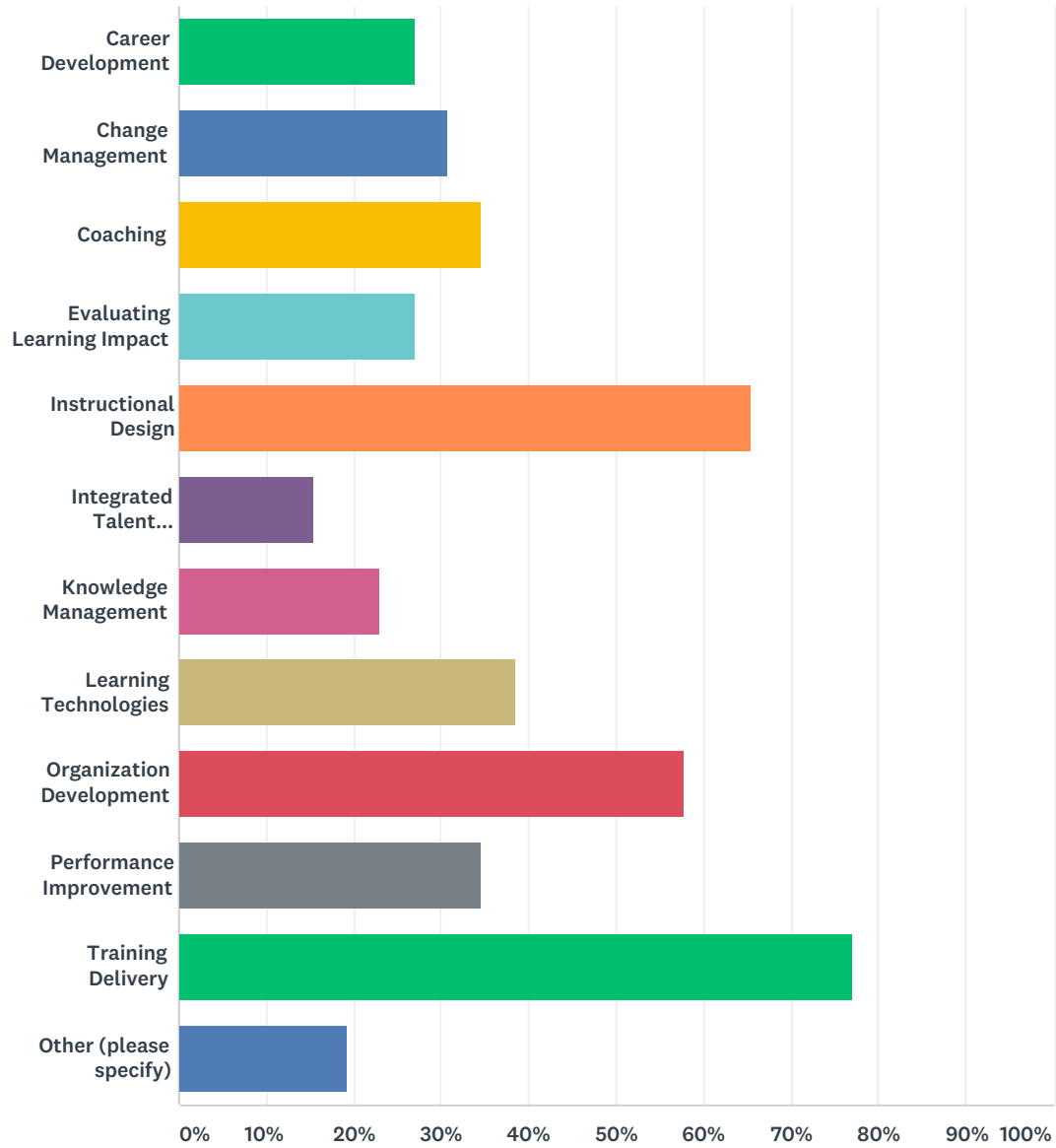


ANSWER CHOICES	RESPONSES	
Less than 6 months	23.08%	6
1 year to less than 3 years	30.77%	8
3 years to less than 5 years	19.23%	5
5 years or more	26.92%	7
TOTAL		26

Q22 What part of the industry do you work in? Select all that apply.

Answered: 26 Skipped: 1

ATD Tulsa Annual Membership Survey 2018



ANSWER CHOICES	RESPONSES
Career Development	26.92% 7
Change Management	30.77% 8

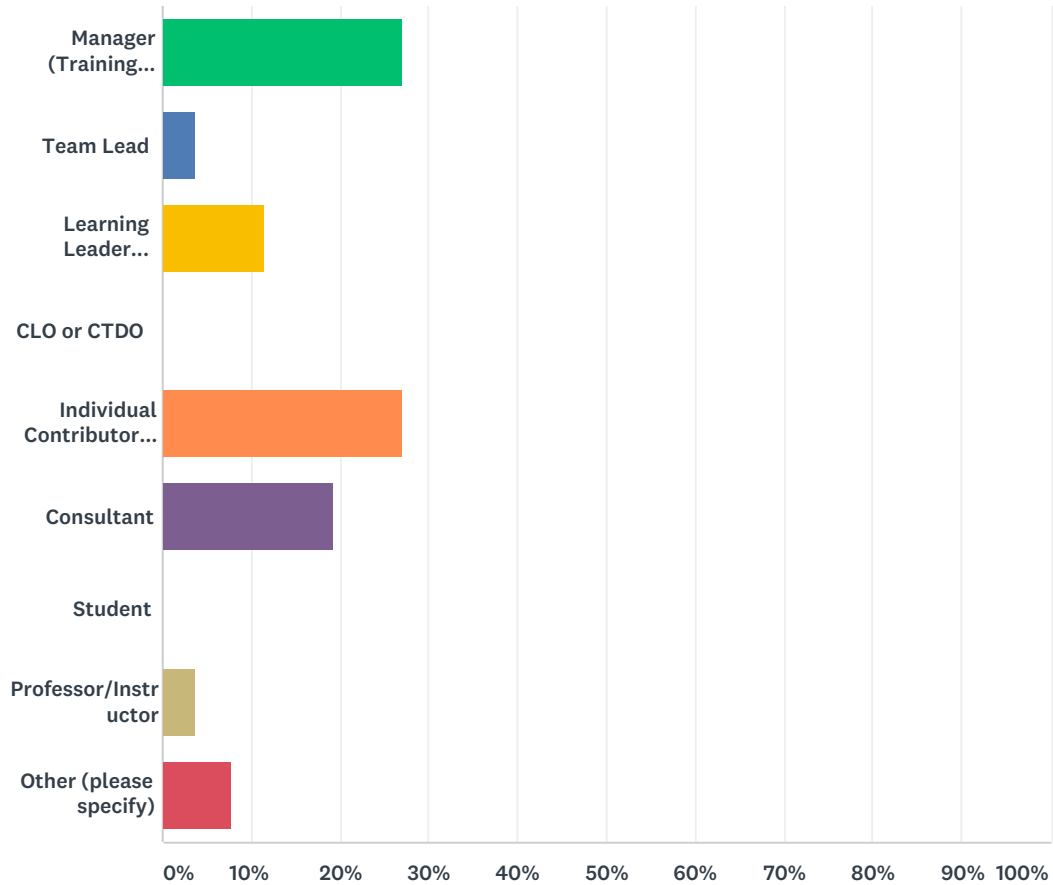
ATD Tulsa Annual Membership Survey 2018

Coaching	34.62%	9
Evaluating Learning Impact	26.92%	7
Instructional Design	65.38%	17
Integrated Talent Management	15.38%	4
Knowledge Management	23.08%	6
Learning Technologies	38.46%	10
Organization Development	57.69%	15
Performance Improvement	34.62%	9
Training Delivery	76.92%	20
Other (please specify)	19.23%	5
Total Respondents: 26		

#	OTHER (PLEASE SPECIFY)	DATE
1	keynotes	9/21/2018 6:35 PM
2	1 on 1 coaching (not internal coaching)	9/21/2018 9:51 AM
3	Human Resources Business Partner	9/21/2018 9:44 AM
4	Public School	9/20/2018 6:55 PM
5	Teacher	9/14/2018 8:26 PM

Q23 What is your professional level?

Answered: 26 Skipped: 1



ANSWER CHOICES	RESPONSES	
Manager (Training Manager, Manager of Sales Training, HR Manager, Learning and Development Manager, Manager of OD)	26.92%	7
Team Lead	3.85%	1
Learning Leader (Director/Vice President)	11.54%	3
CLO or CTDO	0.00%	0

ATD Tulsa Annual Membership Survey 2018

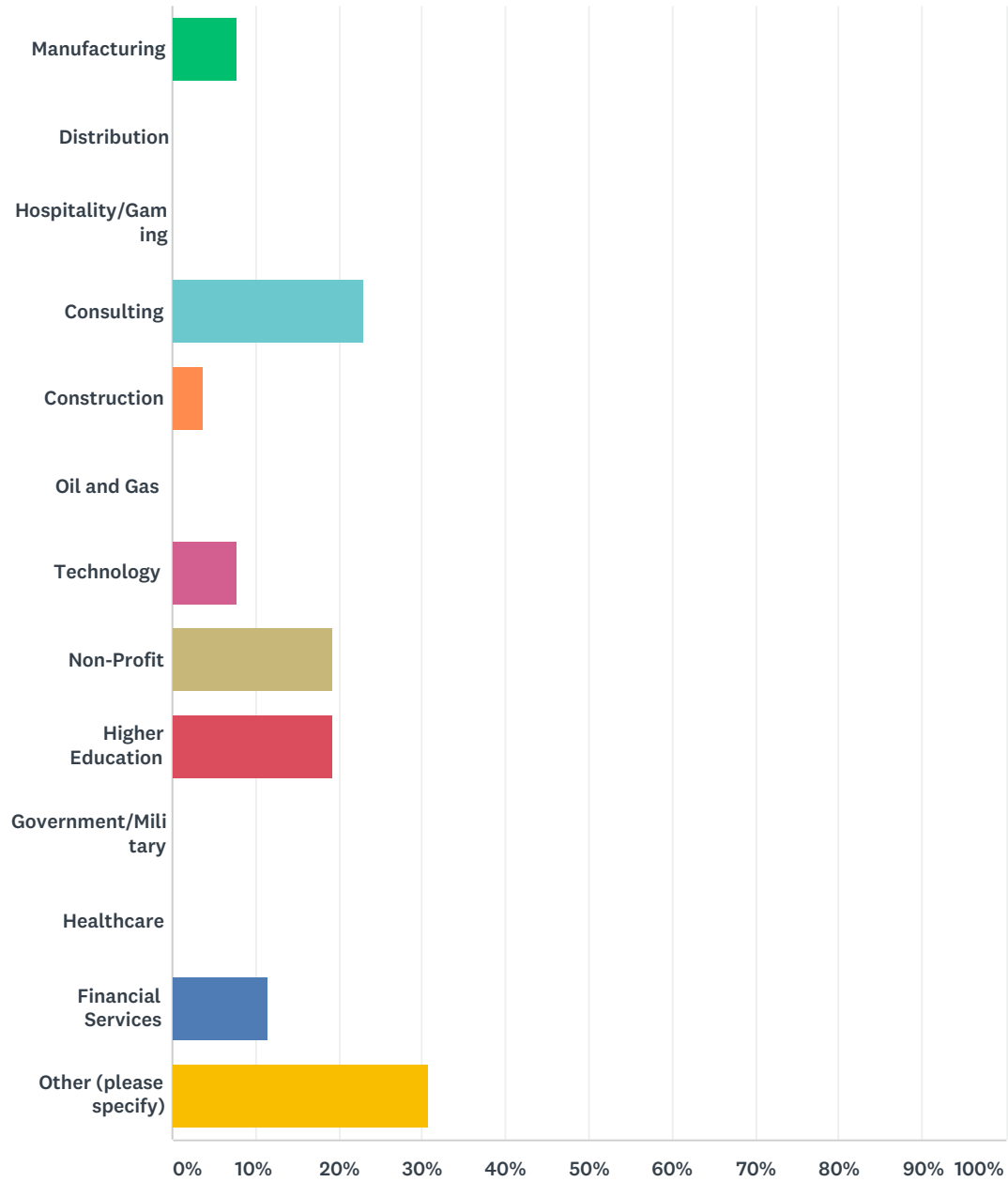
Individual Contributor (Training Specialist, HR Generalist, Instructional Designer, LMS Administrator)	26.92%	7
Consultant	19.23%	5
Student	0.00%	0
Professor/Instructor	3.85%	1
Other (please specify)	7.69%	2
TOTAL		26

#	OTHER (PLEASE SPECIFY)	DATE
1	Trainer, speaker or coach (outside vendor)	9/21/2018 9:51 AM
2	Teacher	9/20/2018 6:55 PM

Q24 What is your company's industry?

Answered: 26 Skipped: 1

ATD Tulsa Annual Membership Survey 2018



ANSWER CHOICES

RESPONSES

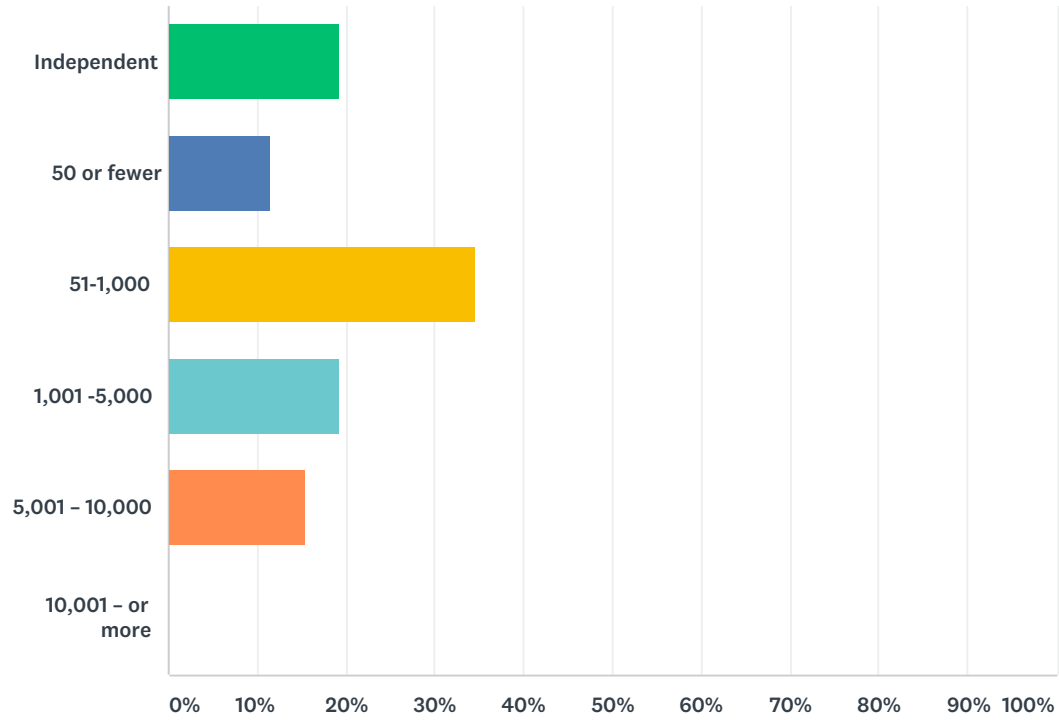
ATD Tulsa Annual Membership Survey 2018

Manufacturing	7.69%	2
Distribution	0.00%	0
Hospitality/Gaming	0.00%	0
Consulting	23.08%	6
Construction	3.85%	1
Oil and Gas	0.00%	0
Technology	7.69%	2
Non-Profit	19.23%	5
Higher Education	19.23%	5
Government/Military	0.00%	0
Healthcare	0.00%	0
Financial Services	11.54%	3
Other (please specify)	30.77%	8
Total Respondents: 26		

#	OTHER (PLEASE SPECIFY)	DATE
1	Utilities	9/21/2018 10:45 AM
2	Business etiquette	9/21/2018 9:51 AM
3	.	9/21/2018 9:37 AM
4	Insurance	9/21/2018 9:23 AM
5	Public School	9/20/2018 6:55 PM
6	EPC	9/17/2018 9:02 AM
7	Aerospace	9/15/2018 3:18 AM
8	For Profit Learning Center	9/14/2018 10:06 AM

Q25 How many employees are in your organization?

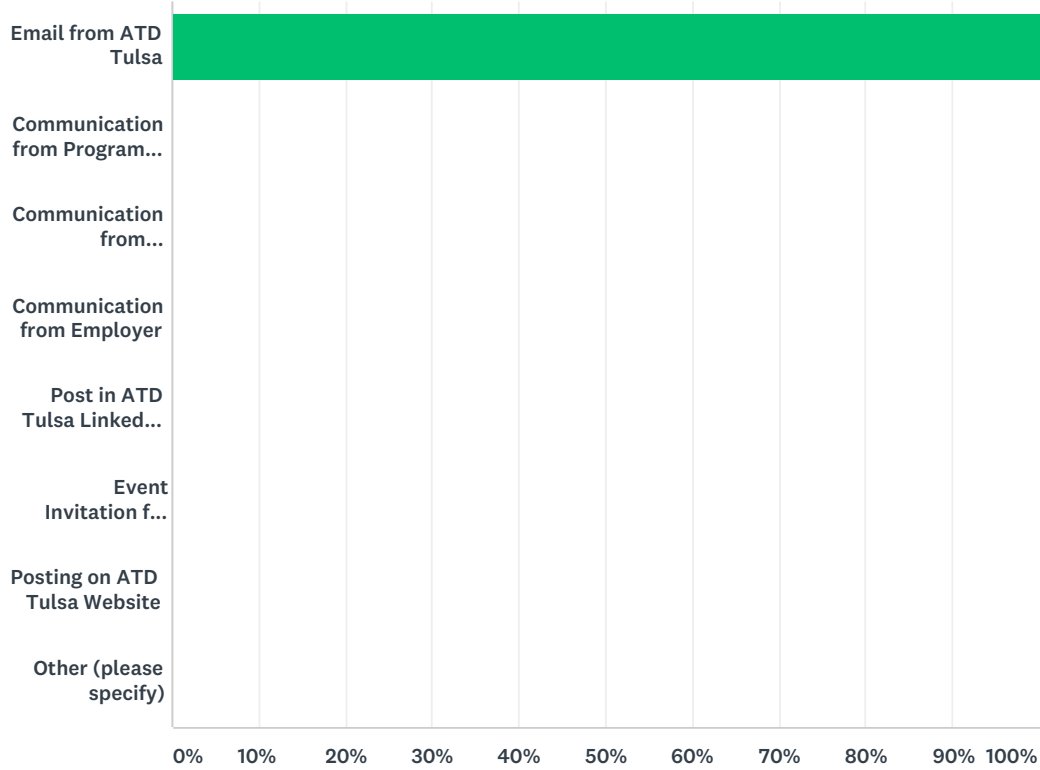
Answered: 26 Skipped: 1



ANSWER CHOICES	RESPONSES	
Independent	19.23%	5
50 or fewer	11.54%	3
51-1,000	34.62%	9
1,001 -5,000	19.23%	5
5,001 – 10,000	15.38%	4
10,001 – or more	0.00%	0
TOTAL		26

Q1 How did you hear about this ATD Tulsa program meeting?

Answered: 6 Skipped: 0

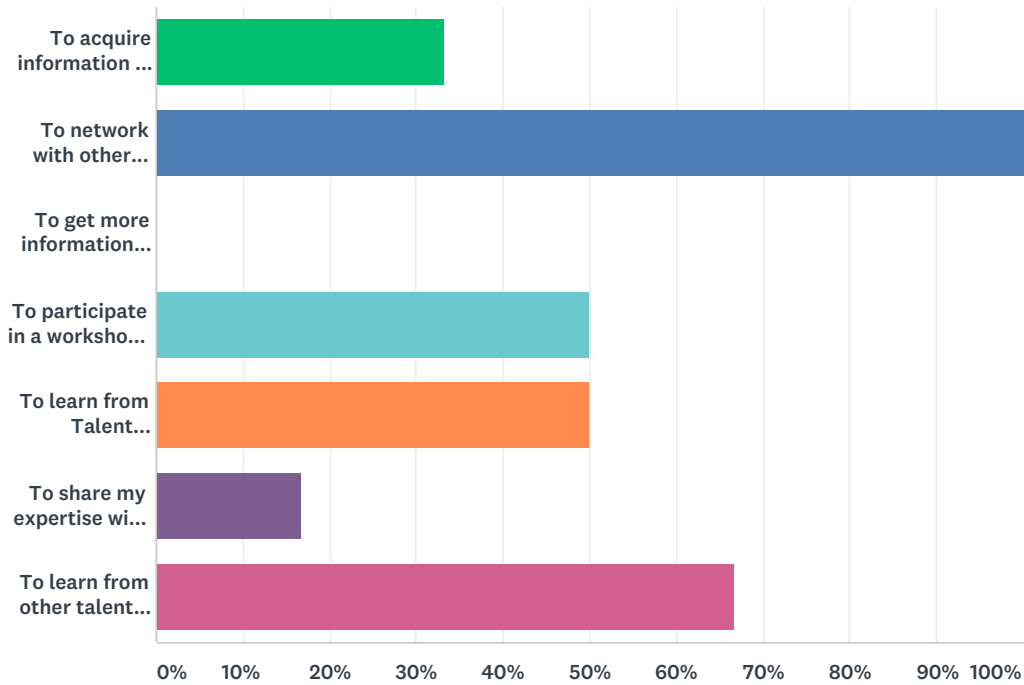


ANSWER CHOICES	RESPONSES	
Email from ATD Tulsa	100.00%	6
Communication from Program Presenter	0.00%	0
Communication from Colleague/Friend	0.00%	0
Communication from Employer	0.00%	0
Post in ATD Tulsa LinkedIn Group	0.00%	0
Event Invitation from ATD Tulsa's Facebook Page	0.00%	0
Posting on ATD Tulsa Website	0.00%	0
Other (please specify)	0.00%	0
TOTAL		6

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

Q2 Why did you attend this ATD Tulsa Program Meeting? Check all that apply.

Answered: 6 Skipped: 0

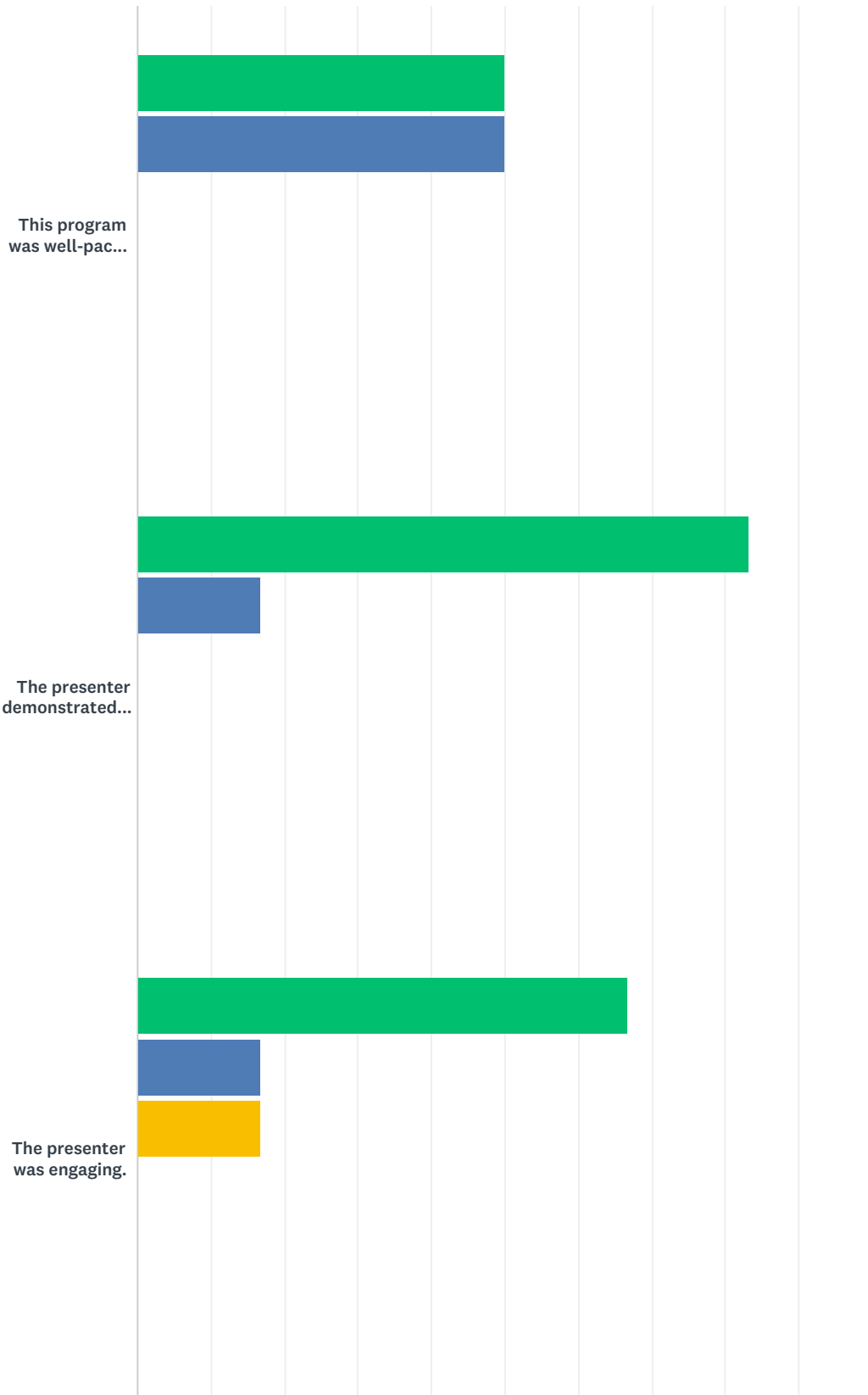


ANSWER CHOICES	RESPONSES
To acquire information on developments in the talent management industry.	33.33% 2
To network with other talent management professionals.	100.00% 6
To get more information about ATD Tulsa.	0.00% 0
To participate in a workshop presented by the speaker.	50.00% 3
To learn from Talent Management industry leaders.	50.00% 3
To share my expertise with other talent management professionals.	16.67% 1
To learn from other talent management professionals attending the program meeting.	66.67% 4
Total Respondents: 6	

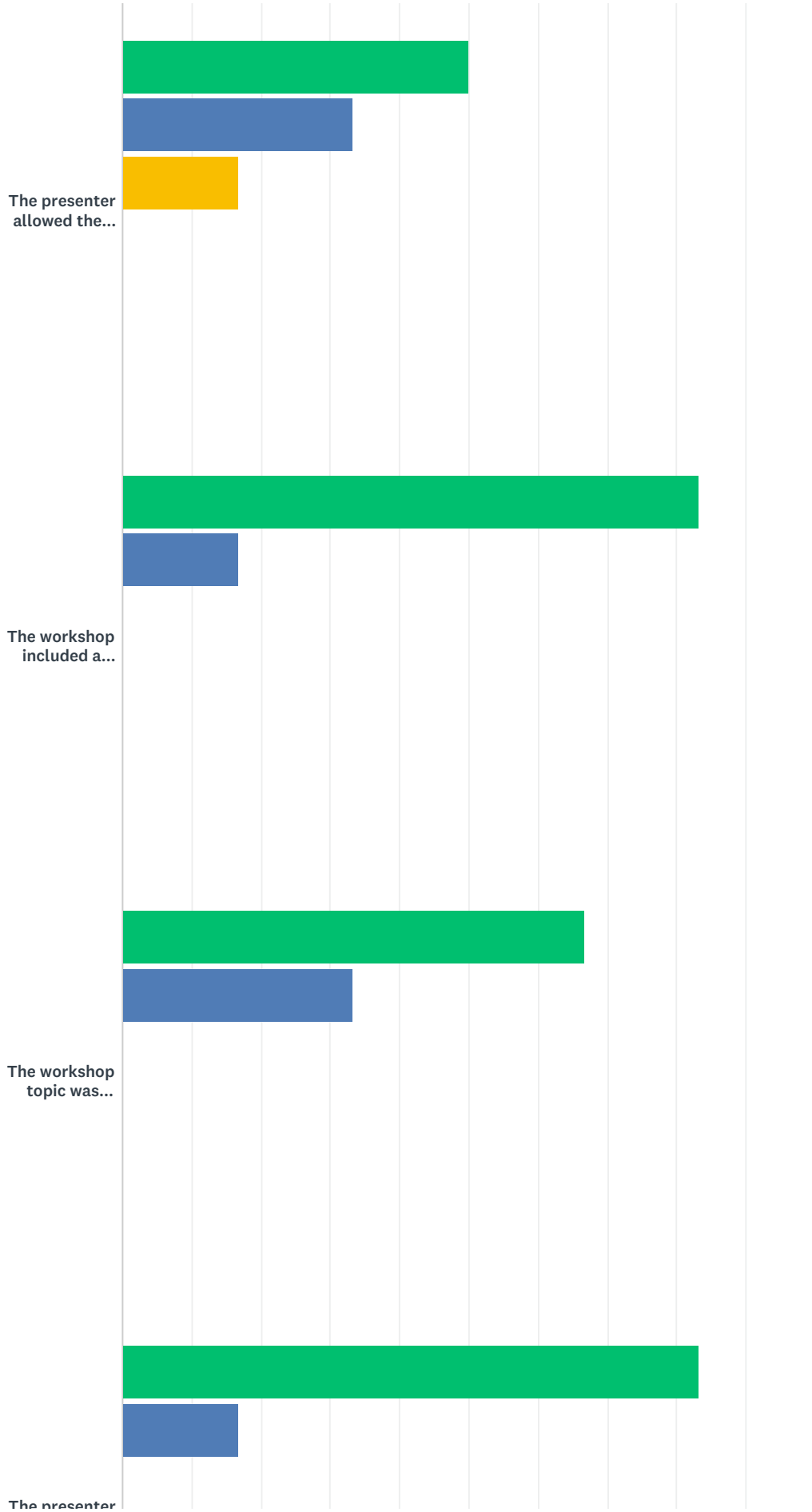
#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

Q3 Please indicate your level of agreement with the following aspects of the facilitators and workshop content.

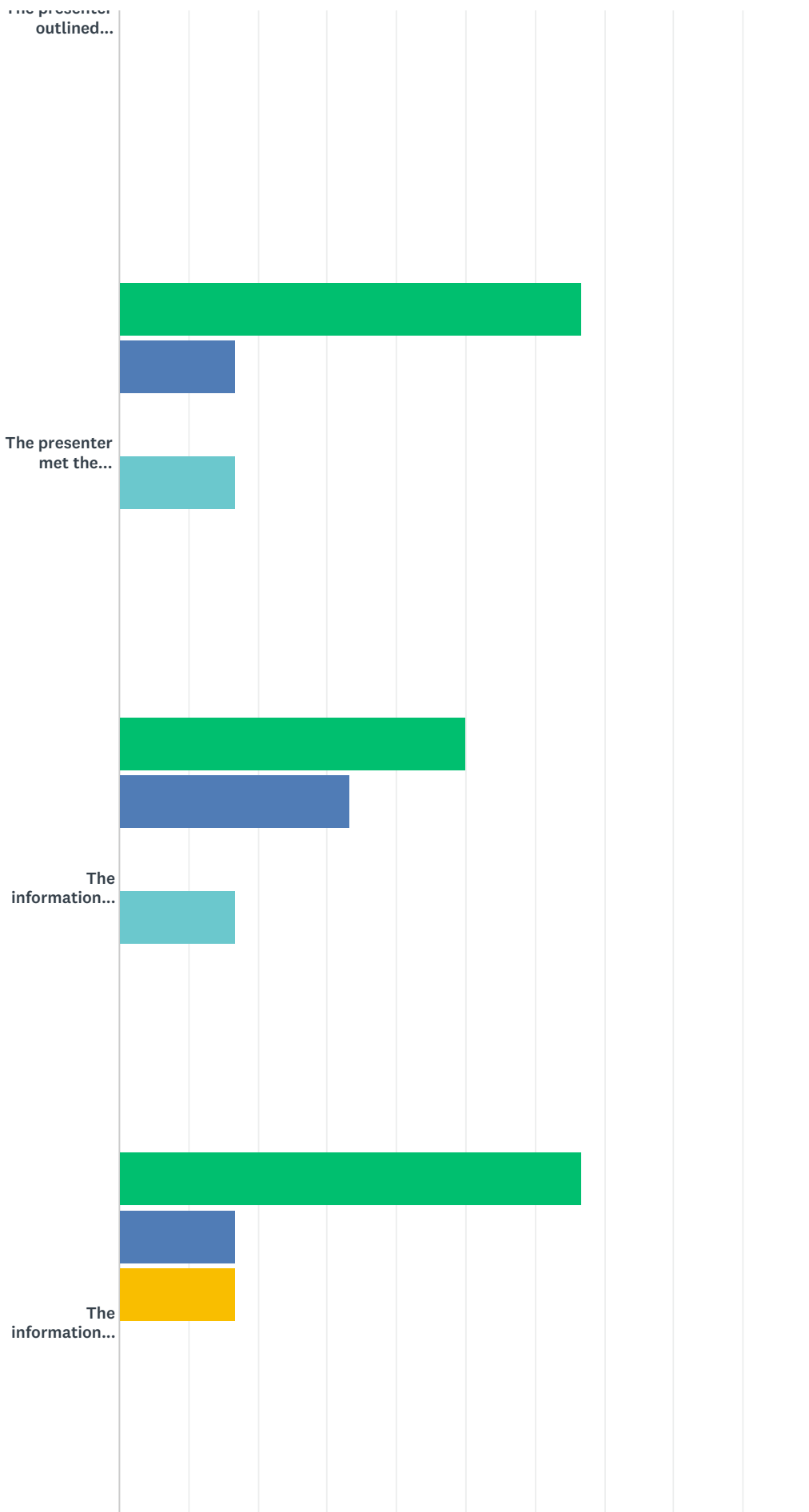
Answered: 6 Skipped: 0



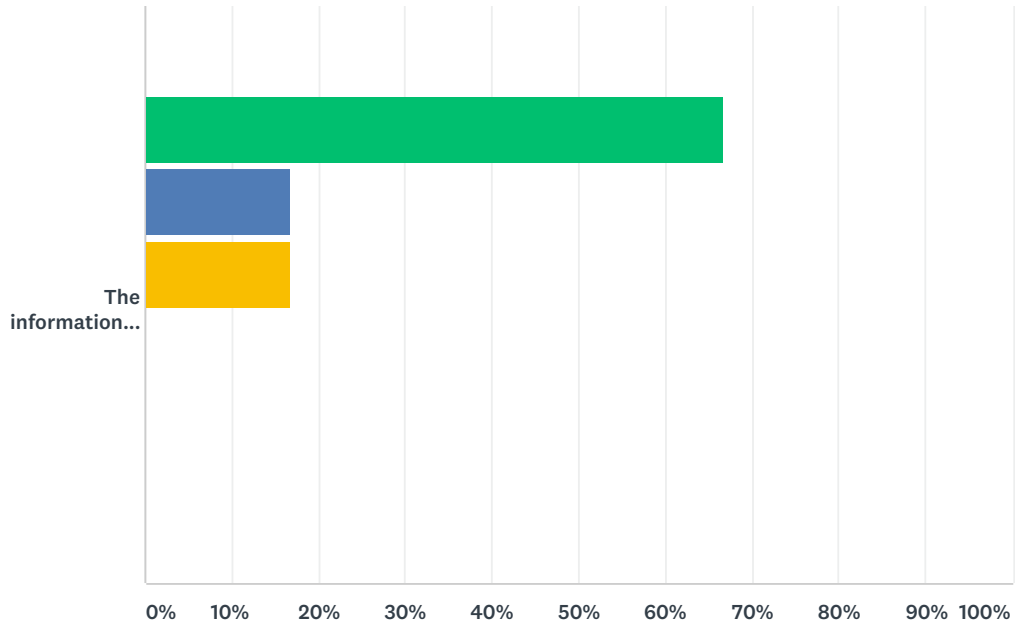
ATD Tulsa - July 19, 2019 Program Meeting Survey



ATD Tulsa - July 19, 2019 Program Meeting Survey



ATD Tulsa - July 19, 2019 Program Meeting Survey



■ Strongly Agree
 ■ Agree
 ■ Neither Agree nor Disagree
 ■ Disagree
■ Strongly Disagree
 ■ Not Applicable

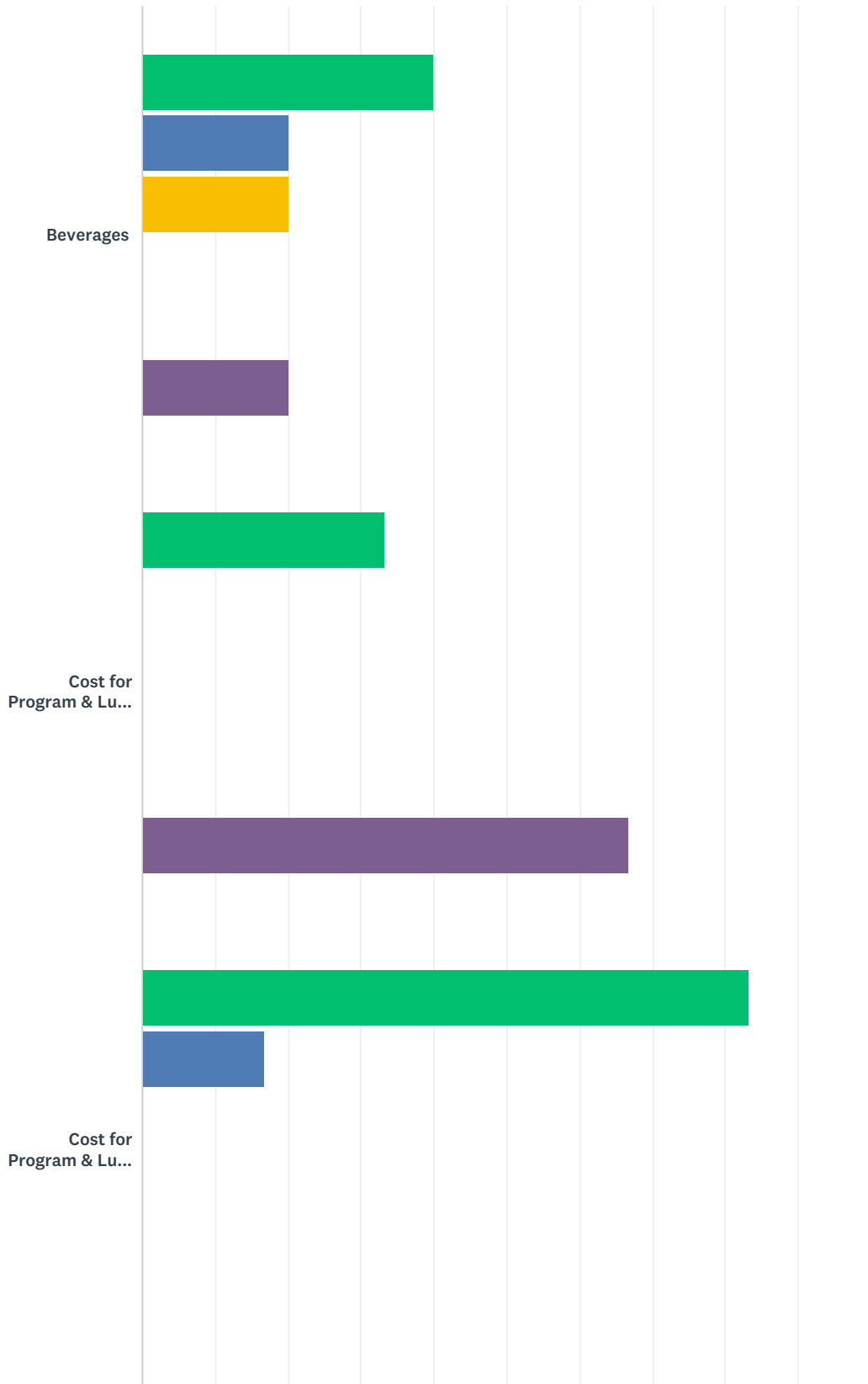
	STRONGLY AGREE	AGREE	NEITHER AGREE NOR DISAGREE	DISAGREE	STRONGLY DISAGREE	NOT APPLICABLE	TOTAL
This program was well-paced and made good use of my time.	50.00% 3	50.00% 3	0.00% 0	0.00% 0	0.00% 0	0.00% 0	6
The presenter demonstrated subject matter expertise and knowledge.	83.33% 5	16.67% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	6
The presenter was engaging.	66.67% 4	16.67% 1	16.67% 1	0.00% 0	0.00% 0	0.00% 0	6
The presenter allowed the right amount of time for discussion.	50.00% 3	33.33% 2	16.67% 1	0.00% 0	0.00% 0	0.00% 0	6
The workshop included a hands-on learning activity.	83.33% 5	16.67% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	6
The workshop topic was delivered as promoted.	66.67% 4	33.33% 2	0.00% 0	0.00% 0	0.00% 0	0.00% 0	6
The presenter outlined objectives for the session.	83.33% 5	16.67% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	6
The presenter met the objectives as outlined.	66.67% 4	16.67% 1	0.00% 0	16.67% 1	0.00% 0	0.00% 0	6
The information presented during this workshop was well organized.	50.00% 3	33.33% 2	0.00% 0	16.67% 1	0.00% 0	0.00% 0	6
The information presented during this workshop is useful to my job.	66.67% 4	16.67% 1	16.67% 1	0.00% 0	0.00% 0	0.00% 0	6
The information presented during this workshop can be applied to my business.	66.67% 4	16.67% 1	16.67% 1	0.00% 0	0.00% 0	0.00% 0	6

ATD Tulsa - July 19, 2019 Program Meeting Survey

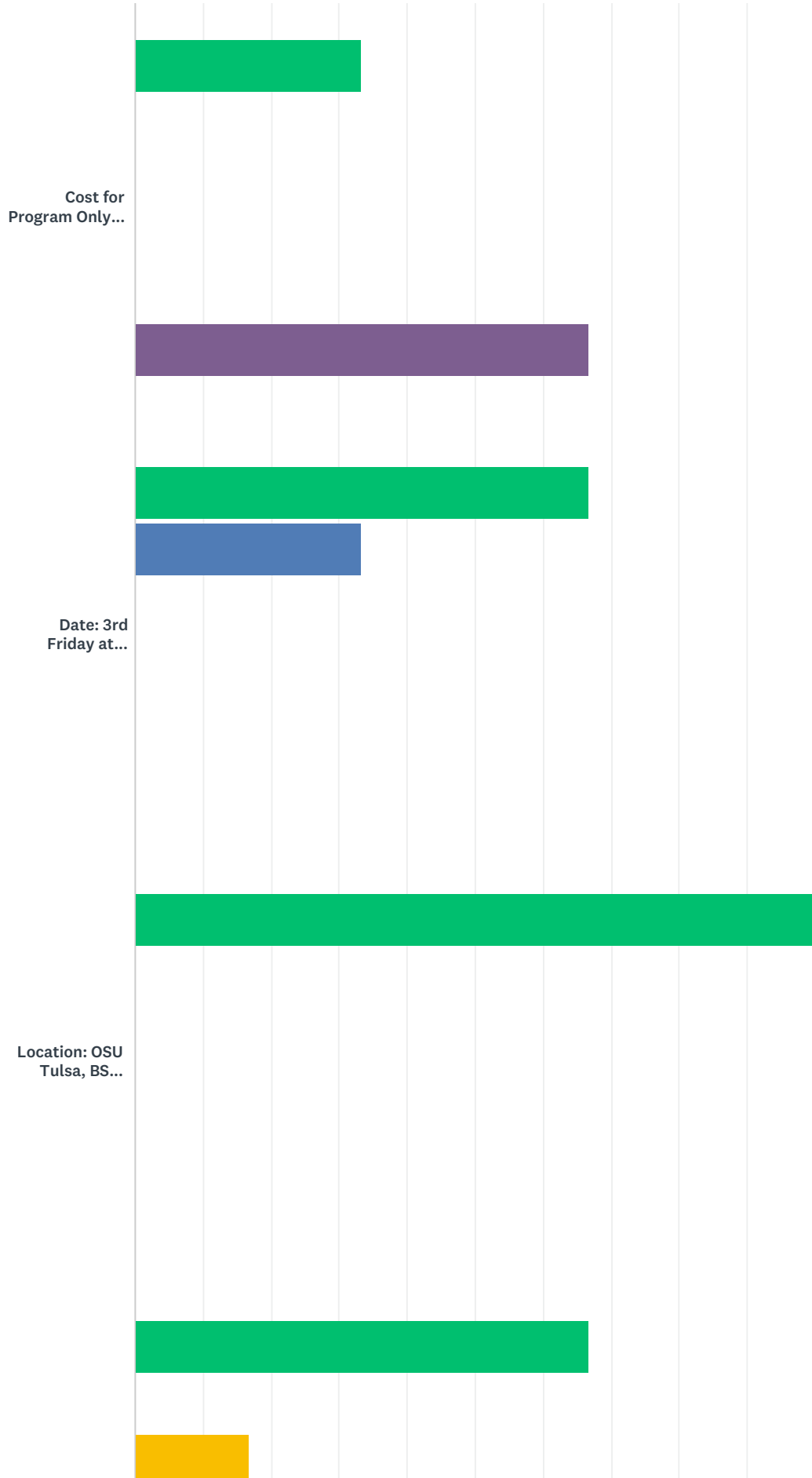
#	IF YOU RATED ANY STATEMENT(S) AS "STRONGLY DISAGREE" OR "DISAGREE," WHAT COULD BE DONE DIFFERENTLY TO CHANGE YOUR RESPONSE TO "STRONGLY AGREE?"	DATE
1	Great content and training delivery technique!	7/22/2019 9:59 AM
2	too much time on the problem - not enough time on the solution	7/22/2019 9:58 AM

Q4 Please rate the following aspects of the program as Excellent, Good, Fair, Poor or Terrible. Or if it does not apply to you, Not Applicable.

Answered: 6 Skipped: 0



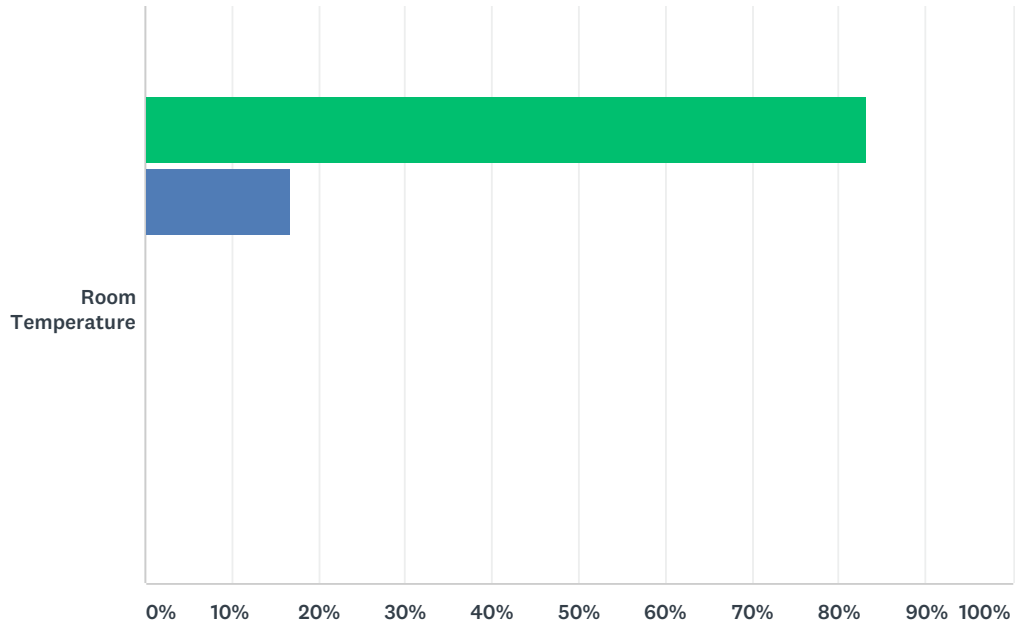
ATD Tulsa - July 19, 2019 Program Meeting Survey



ATD Tulsa - July 19, 2019 Program Meeting Survey



ATD Tulsa - July 19, 2019 Program Meeting Survey



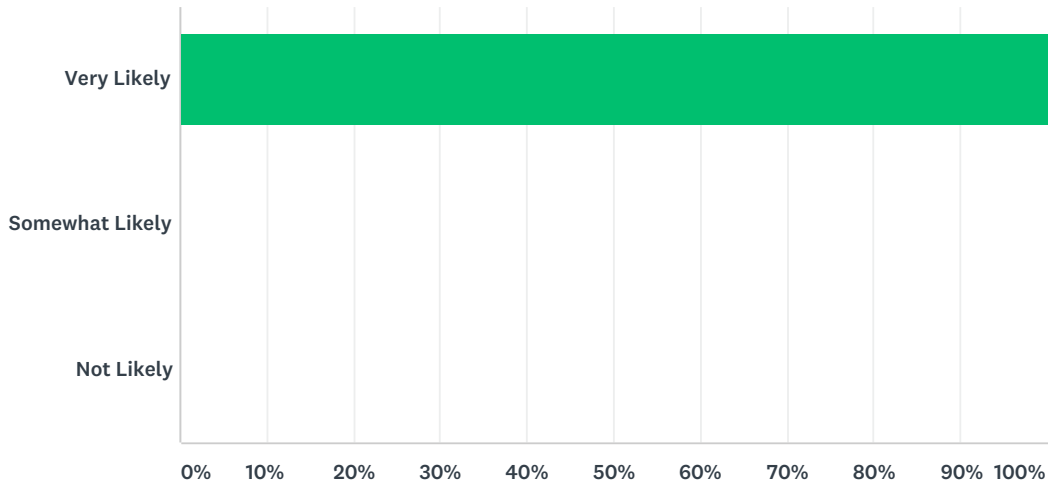
■ Excellent
 ■ Good
 ■ Fair
 ■ Poor
 ■ Terrible
 ■ Not Applicable

	EXCELLENT	GOOD	FAIR	POOR	TERRIBLE	NOT APPLICABLE	TOTAL
Beverages	40.00% 2	20.00% 1	20.00% 1	0.00% 0	0.00% 0	20.00% 1	5
Cost for Program & Lunch (Guest)	33.33% 2	0.00% 0	0.00% 0	0.00% 0	0.00% 0	66.67% 4	6
Cost for Program & Lunch (Member)	83.33% 5	16.67% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	6
Cost for Program Only (Member or Guest)	33.33% 2	0.00% 0	0.00% 0	0.00% 0	0.00% 0	66.67% 4	6
Date: 3rd Friday at lunchtime from 11:30 AM to 1:15 PM	66.67% 4	33.33% 2	0.00% 0	0.00% 0	0.00% 0	0.00% 0	6
Location: OSU Tulsa, BS Roberts Room	100.00% 6	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	6
Lunch Meal	66.67% 4	0.00% 0	16.67% 1	0.00% 0	0.00% 0	16.67% 1	6
Online registration process	100.00% 6	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	6
Parking	100.00% 6	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	6
Room Setup	83.33% 5	16.67% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	6
Room Temperature	83.33% 5	16.67% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	6

#	IF YOU RATED ANY ITEM(S) AS FAIR, POOR OR TERRIBLE, WHAT COULD WE DO DIFFERENTLY TO CHANGE YOUR RATING TO EXCELLENT?	DATE
1	soda would be nice	7/22/2019 9:54 AM

Q5 Based on your experience at this ATD Tulsa program meeting, how likely are you to attend another program meeting?

Answered: 6 Skipped: 0



ANSWER CHOICES	RESPONSES	
Very Likely	100.00%	6
Somewhat Likely	0.00%	0
Not Likely	0.00%	0
TOTAL		6

#	IF YOU ANSWERED SOMEWHAT LIKELY OR NOT LIKELY, WHAT COULD WE DO DIFFERENTLY TO CHANGE YOUR RESPONSE TO VERY LIKELY?	DATE
	There are no responses.	

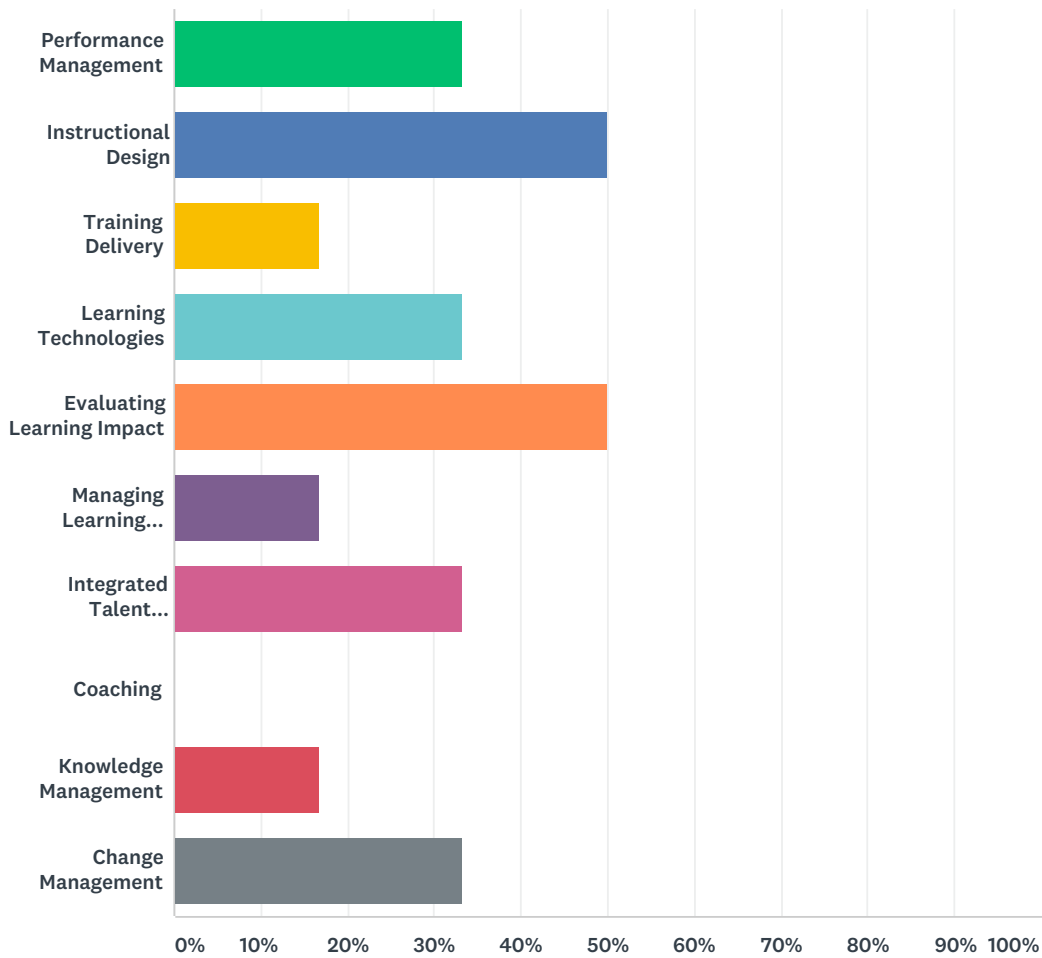
Q6 Are there speakers, companies or organizations that you would like to have present at a future ATD Tulsa program meeting? If yes, please list them.

Answered: 1 Skipped: 5

#	RESPONSES	DATE
1	I would consider having Dr. Vincent do a half-day workshop on the same topic or another one next year.	7/22/2019 9:59 AM

Q7 Which of the following ATD Competency Model Areas of Expertise are you MOST interested in seeing presented? Check all that apply.

Answered: 6 Skipped: 0



ANSWER CHOICES	RESPONSES	
Performance Management	33.33%	2
Instructional Design	50.00%	3
Training Delivery	16.67%	1
Learning Technologies	33.33%	2
Evaluating Learning Impact	50.00%	3
Managing Learning Programs	16.67%	1
Integrated Talent Management	33.33%	2
Coaching	0.00%	0
Knowledge Management	16.67%	1
Change Management	33.33%	2

Total Respondents: 6

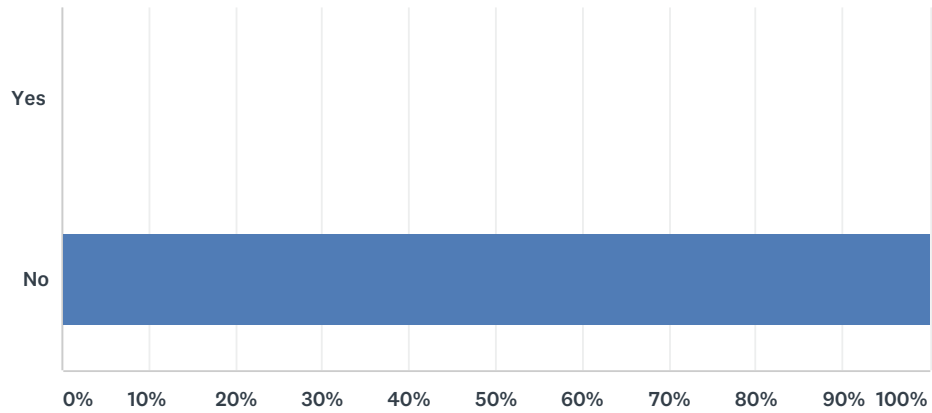
Q8 Do you have any questions, comments or concerns? (If you would like for us to respond directly, please include your preferred contact information.)

Answered: 1 Skipped: 5

#	RESPONSES	DATE
1	This was a great session but I feel like the title did a disservice to the content. Maybe we could pass that on to her - the title needs to be shorter.	7/22/2019 9:54 AM

Q9 Was this the first time you attended an ATD Tulsa program meeting?

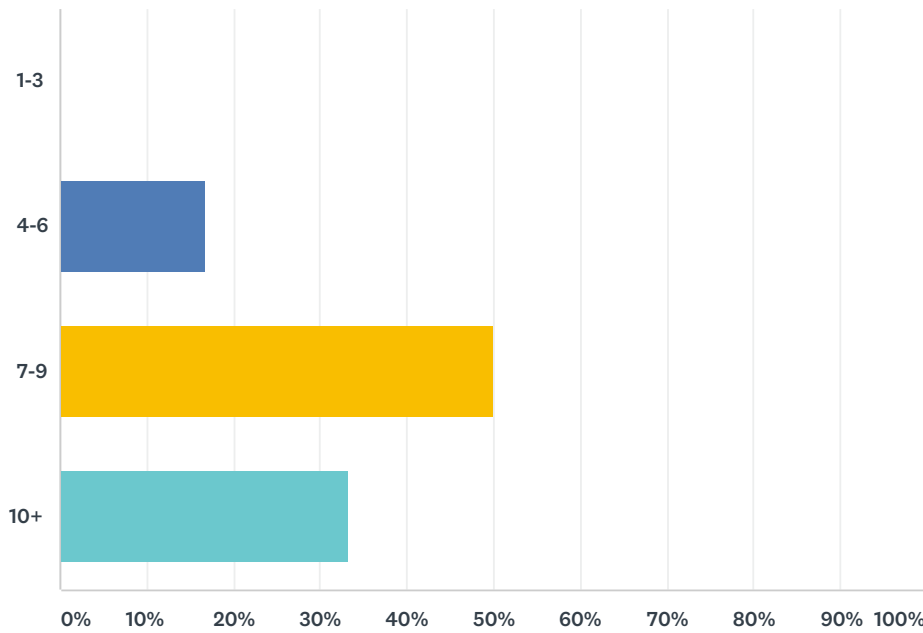
Answered: 6 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	0.00%	0
No	100.00%	6
TOTAL		6

Q10 If no, how many ATD Tulsa program meetings have you attended in the last year?

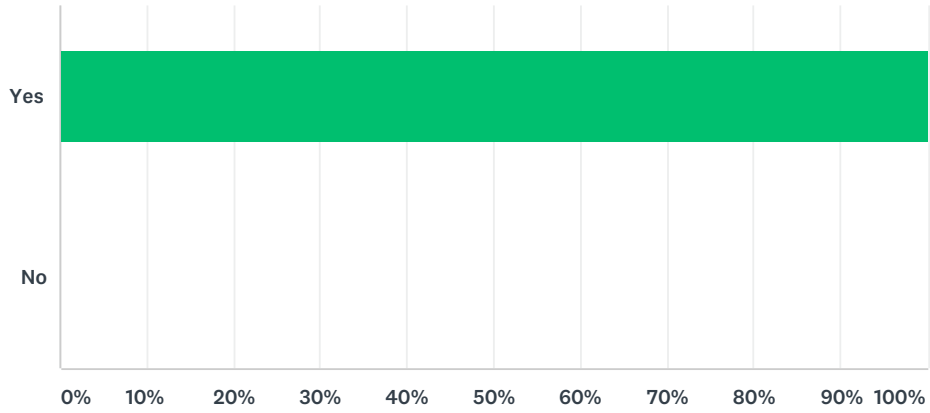
Answered: 6 Skipped: 0



ANSWER CHOICES	RESPONSES	
1-3	0.00%	0
4-6	16.67%	1
7-9	50.00%	3
10+	33.33%	2
TOTAL		6

Q11 Are you an ATD Tulsa member?

Answered: 6 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	100.00%	6
No	0.00%	0
TOTAL		6

**ATD TULSA 2018 PROGRAMS
WORKSHOP PROPOSAL FORM**

Workshop Information

1. **Name/Title/Credentials:***(to appear in promotional/marketing materials):*
Garland C McWatters, Author & teacher, INPowered2 LEAD.
2. **Workshop Title:**
7 Approaches to thinking
3. **Describe How Your Workshop Fits our Program Objective (Theme):** To advance ATD’s mission to “empower professionals to develop talent in the workplace”. 100 words or less

We often hear the terms critical thinking and creative thinking as catch-all phrases for approaches to thinking. Actually, there are seven identifiable approaches, each with a different use and "feel" to them. They are: outcome, analytical, sequential, critical, lateral, creative, and strategic thinking. Professionals who understand these differences will be better able to help workplace contributors to understand and use these approaches more effectively. This session is relevant to the personal improvement area of expertise.

Per the ATD Competency Model, relevant topics include:

<i>Areas of Expertise</i>	
1. Change Management	2. Coaching
3. Evaluating Learning Impact	4. Instructional Design
5. Integrated Talent Management	6. Knowledge Management
7. Learning Technologies	8. Managing Learning Programs
9. Performance Improvement	10. Training Delivery
<i>Foundational Competencies</i>	
1. Business Skills	2. Interpersonal Skills
3. Global Mindset	4. Personal Skills
5. Industry Knowledge	6. Technology Literacy

4. **Describe How Your Workshop Contributes to the Professional Development of ATD Tulsa Program Attendees:** 100 words or less

Attendees will experience at least four thinking activities to demonstrate how different types of thinking "feel" to them and why some types of thinking are more natural for some while uncomfortable for others.

5. **Workshop Description:** 200 words or less

We tend to use the thinking approach that is most natural to us and shy away from the approaches that are uncomfortable. That makes us, at best, about 40% effective. We can do much better by understanding the 7 approaches to thinking, how they are different, and why we use them.

Different situations require different approaches to thinking. We have a variety of thinking approaches available to help us find workable solutions to perplexing challenges. This session presents an introduction to seven structured approaches that can be used individually and in combinations to work through complex issues. Participants will complete activities requiring specific thinking approaches.

6. **Target Audience and Level:** (novice – entry level, intermediate – middle level or advanced – senior level.)

Entry to middle. I have presented the full version of this session to audiences of various levels from entry to advanced.

7. **Learning Objectives:** 300 words or less

State at least three (3) Learning Objectives for the proposed workshop. Each objective should specifically indicate the results and outcomes you seek in terms of participants' knowledge, skills, and behavior. For each objective, use the format: "After participating in this workshop, participants will be able to..."

- Name and describe the 7 approaches to thinking
- Identify which thinking approaches are the most natural to them
- Name common workplace and personal situations in which each thinking approach is, or can be, used

8. **Workshop Design Plan:**

Include a workshop outline with timeframes and delivery methods for all activities. Each workshop timeframe is 60 minutes including time for questions and answers.

I use PowerPoint slides to support each element of the content. I will provide a handout which will contain definitions of each thinking approach and room to make notes as participants engage in the activities.

1. Intro and session objectives will demonstrate **OUTCOME** thinking by the objective presented in the handout. Participants will give examples of how outcome thinking is used. Time 3 minutes

2. ANALYTICAL thinking. Presenter will define analytical thinking and ask participants to do a quick analytical activity by describing the details of an image shown in a PowerPoint slide. Presenter will show some common models of analytical tools used in the workplace. Time 4 minutes

3. SEQUENTIAL thinking. Presenter will ask class to write down a familiar sequence they use daily to make the point of SEQUENTIAL thinking. Emphasize how Sequential thinking establishes order through routine and planning. Class will name some examples of Sequential thinking in their experience. Time 4 minutes

4. CRITICAL thinking. Presenter will handout a critical thinking group activity, give instructions, with the definition of Critical thinking, and allow time for group processing to reach their conclusion. Each group will present their conclusion and reasoning to support it. Time 15 minutes.

5. LATERAL thinking. Presenter will define Lateral thinking and give an example. Presenter will pass out a Lateral thinking activity. Each table group will have a different assignment and 90 seconds to work on it. Each group will then report their ideas. Time 7 minutes

6. CREATIVE thinking. Presenter will give definition of Creative thinking and demonstrate the activity the class will do called "The story is . . ." Each table group completes its story that starts from four random words that must be incorporated into the storyline. At the end of a 10 minute work session each group presents its Creative storyline. Time 17 minutes.

7. STRATEGIC thinking. Presenter gives definition of Strategic thinking and explains how Strategic is a hybrid of all the other approaches. Time 3 minutes

Q&A Time 3 min

Total projected time 57 minutes.

9. **Handout / Performance Tools:**

7 Approaches to Thinking. Session handout. 8.5 x 11 folded in half (four pages). This might grow to 2 sheets folded (8 pages)

Critical thinking activity. Letter size page. One per participant

What if? scenario card. One per table

Random word generator game to get random words.

10. **AV and / or Room Configuration Requirements:**

Please note: The workshop room will be equipped with a desktop computer, projector, screen, and microphone (if needed). Additional AV or configuration needs, including internet access or computer audio projection, must be noted in your proposal.

Usual configuration for meetings is appropriate.

11. **Evidence of Professional Qualifications and Credentials:** 300 words or less

Include relevant education, Professional Certifications, personal and professional awards and/or commendations received personally or as a “key player” in the organization for specific project(s). Include your public speaking experience(s), listing similar presentations with particulars about when, where, size of audience, subject, etc. You may attach a resume for further elaboration.

12. **Demonstration of Presenter Ability:**

A. Provide evaluation results from a past presentation on that demonstrates your style and ability. Preferred evaluation results will include content related to the proposed workshop topic.

Sorry that I do not have copies readily available. My most recent work has been done through Collin College in Plano, Texas. They evaluated everything I did, and what I have seen shows a consistent "agree-highly agree" on all the evaluative elements.

You also may contact Lorinda Schrammel. I have done some sessions for her in the last couple of years.

I also spent several years presenting for Rose State College when they were the main training vendor for Tinker AFB. I taught in many of their programs and was always asked back as one of their highest rated presenters.

B. *Optional* – Provide a link or video attachment of you presenting that demonstrates your style and ability. Preferred videos will include content related to the proposed topic.

13. **Biography:** 300 words or less per speaker

Garland McWatters's focus is on developing what he calls INPowering workplaces, where employees have the opportunity to find personal meaning while giving their best at work. His quest is to build individuals who are INPowered to Lead.

Garland is an author, storyteller, and consultant who writes and presents leadership, management, and process improvement courses. He has worked in a variety of industry segments including manufacturing, distribution, health care, financial, government sectors (municipal, county, and state), energy, education, service, and professional.

Garland is author of the course *Creating an INPowering Workplace*

<https://www.inpoweredtolead.com/inp-labs/creating-an-inpowering-workplace-course/>.

Before going into private practice in 1994, Garland had a 15-year career in Oklahoma's renowned career technology education system. He held both staff and management positions in three of Oklahoma's leading area career-tech centers.

Garland earned a M.S. in mass communication from the Oklahoma State University and a B.A. in Biblical Studies from Oklahoma Christian University of Science and Arts.

Garland has been involved in numerous civic, professional, and community organizations. He was president of the Central Oklahoma Chapter of ASTD in 1991. The American Society for Training and Development (ASTD) honored Garland in 1991 with a regional Distinguished Achievement Award. He has received numerous other awards and recognition for his work. He is a past president of Oklahoma Territory Tellers and the Oklahoma School Public Relations Association. Garland also has been active in the political arena. He was his party's nominee for a seat in the U.S. House of Representatives from the state of Oklahoma in the 2000 election cycle.

Garland has also been instrumental in organizing and promoting the NextGen Under 30 Oklahoma and NextGen Oklahoma Leaders project. He has developed and presented leadership retreats and regional leadership workshops for the NextGen project since 2016.

14. Professional References:

Provide the names, addresses, telephone numbers and email addresses of three (3) references, specifying the context in which the references know you and are familiar with your skills as a workshop presenter or speaker. Please ensure that each is aware he/she may be contacted for feedback on the primary speaker's presentation style and technique. Note: If you have presented at ATD Tulsa in the past, please provide the date and topics.

- Lorinda Schrammel, OSU Mgr Training and Development, 405 744-2908
- Tony Beasley, HR analyst, City of Plano TX, 972-941-7339, tonyb@plano.gov
- Linda Dowling, Communication Concepts, Moore, OK. 405-620-3596, linda@comcon1.com
- Don Swift, founder NextGen Under 30 Oklahoma, Oklahoma City, OK, 405-816-3338, swiftdon2@cox.net

15. Professional Photo:

Submit a professional color headshot photo of the presenter(s) in JPEG format.

For workshop promotional/marketing materials

**ATD TULSA 2018 PROGRAMS
WORKSHOP PROPOSAL FORM**

Workshop Information

1. Name/Title/Credentials:

a. *Dr. Matt Joiner, Executive Director, Education, ENERGY worldnet, Inc.*

2. Workshop Title:

a. *“Blended Learning: Enhancing Training Through the Use of Virtual Reality”*

3. Describe How Your Workshop Fits our Program Objective (Theme):

a. *This workshop supports well ATD’s vision to “empower professionals to develop talent in the workplace” as the workshop material addresses a blended learning model that includes 21st-century, immersive technologies designed to help shape current and future workplace trainings.*

b. Per the ATD Competency Model, relevant topics include:

i. *Applicable items are bolded and italicized in the table below.*

Areas of Expertise	
1. <i>Change Management</i>	2. Coaching
3. <i>Evaluating Learning Impact</i>	4. <i>Instructional Design</i>
5. Integrated Talent Management	6. <i>Knowledge Management</i>
7. <i>Learning Technologies</i>	8. <i>Managing Learning Programs</i>
9. <i>Performance Improvement</i>	10. <i>Training Delivery</i>
Foundational Competencies	
1. Business Skills	2. Interpersonal Skills
3. Global Mindset	4. Personal Skills
5. <i>Industry Knowledge</i>	6. <i>Technology Literacy</i>

4. Describe How Your Workshop Contributes to the Professional Development of ATD Tulsa Program Attendees:

a. *This workshop will afford ATD workshop participants the occasion to expand their individual and corporate knowledge of the up-and-coming world of virtual reality. During the session, research-based information and first-hand knowledge and experiences will be shared, allowing participants the opportunity to enquire, grow, and make plans for future research and/or possible implementation.*

5. Workshop Description:

a. *Virtual and augmented reality are not just for video games anymore. Companies are increasingly bringing mixed reality into the work environment to build meaningful employee learning and training experiences. Mixed reality is changing the way we train and is enabling skilled workers the ability to step into real-life situations where previously impossible. Implementing an appropriate combination of these types of 21st-century educational experiences can be tricky. In this session, participants will explore the obstacles and opportunities*

associated with creating blended learning experiences that leverage the power of mixed reality at your organization.

6. Target Audience and Level:

- a. Novice, entry-level attendees through individuals with more advanced knowledge and understanding of virtual reality are well-suited for this workshop.*

7. Learning Objectives:

- 1. After participating in this workshop, participants will be able to identify the seven (7) components of the blended learning model.*
- 2. After participating in this workshop, participants will be able to articulate the chief differences between Virtual Reality, Augmented Reality, Mixed Reality, and 360-Degree/Immersive Video.*
- 3. After participating in this workshop, participants will be able to identify the primary rewards and challenges associated with a blended learning model that includes extended reality.*

8. Workshop Design Plan:

- 1. History of VR*
- 2. Current and anticipated future VR technologies*
- 3. Blended Learning Model*
- 4. VR terminology – Virtual Reality, Augmented Reality, Mixed Reality, 360-Degree/Immersive Video*
- 5. Benefits, challenges, and rewards of a Blended Learning Model that includes VR*
- 6. Best practices and considerations for VR exploration and implementation*
- 7. Hands-on VR experience – EWN Virtual Fire Extinguisher Training*

9. Handout / Performance Tools:

- a. There are no formal handouts associated with this presentation. Participants will be provided with a business card from the presenter so that they are able to request additional information and/or the bibliographical information associated with workshop materials.*

10. AV and / or Room Configuration Requirements:

- a. Necessary resources from ATD: Wireless internet access, projector*
- b. EWN will provide: Laptop computer, laser pointer/remote clicker, cords/connectors*

11. Evidence of Professional Qualifications and Credentials:

- a. Dr. Joiner is experienced in instructing K-12, higher education, and corporate learners, having spent five (5) years as a public-school teacher and thirteen (13) years as a higher education adjunct professor and dean. Matt has three degrees in education and possesses teaching and administrative certification credentials from the Texas Board for Educator Certification. He has addressed audiences of*

multiple sizes in multiple modalities over the course of his twenty (20) year career. Dr. Joiner has spoken at various industry-related events, most recently at the Texas Gas Association's Operations and Management Conference in July 2019 in San Marcos, Texas.

12. Demonstration of Presenter Ability:

- a. Matt recently (July 31, 2019) instructed one of ENERGY worldnet, Inc.'s instructor-led trainings, *Soft Skills for Leaders*. For this course, a course satisfaction evaluation rate of 98 was recorded from participant survey results.

13. Biography:

- a. Dr. Matt Joiner is the Executive Director of Education at ENERGY worldnet, Inc. in Decatur, Texas. Previously, Matt held positions at as the Region 11 Education Service Center in Fort Worth, TX from 2017-2018 and as an Instructional Dean at Weatherford College in Weatherford, TX from 2005-2017. Matt's passion is in education, and he has been involved at many different levels of education. He also is highly active in the education industry, sitting on boards, and participating in various initiatives throughout the state of Texas.
- b. Ms. Mayra Maese is the Senior Vice President of Education and Compliance at ENERGY worldnet, Inc., a Compliance Management and Workforce Development firm. She has over ten (10) years' experience in the Oil & Gas Industry with a focus on the development of results-based training in alignment with industry standards and compliance of OQ Programs. Ms. Maese also actively participates and speaks at numerous industry associations.

14. Professional References:

- a. Geoff Isbell, President, ENERGY worldnet, Inc., 1210 S. Bus. Hwy. 81/287, Decatur, TX 76234, 940-626-1941, geoff.isbell@energyworldnet.com
- b. Darrell Cherry, President, the Texas Gas Association, P.O. Box 440340, Houston, TX 77244, 281-497-8427, cherry@texasgas.com
- c. Mr. Michael Endy, Vice President, Instruction and Student Services, Weatherford College, 225 College Park Dr., Weatherford, TX 76086, 817-594-5471, mendy@wc.edu

15. Professional Photo:

- a. Attached to email.

**ATD TULSA 2018 PROGRAMS
WORKSHOP PROPOSAL INFORMATION SHEET**

Speaker Information

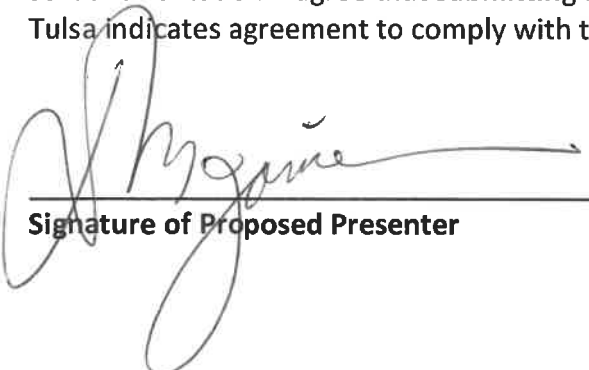
Primary Speaker Name	Dr. Matt Joiner
Secondary Speaker Name	Ms. Mayra Maese
Workshop Title	"Blended Learning: Enhancing Training Through the Use of Virtual Reality"

Please complete the below based on the primary speaker.

Phone	Primary#:	Secondary#:
Email Address	Matt.Joiner@energyworldnet.com	
Title	Executive Director, Education	
Company or Organization	ENERGY worldnet, Inc.	
Mailing Address	1210 S. Business 81/287	
City, State, Zip	Decatur, TX 76234	

Statement of Understanding

By signing this proposal information sheet, I acknowledge that if my proposal is accepted by ATD Tulsa, I will provide conference speaking services *pro bono publico* in support of the goals and objectives of ATD Tulsa. I agree to indemnify and hold ATD Tulsa harmless from any liability. I agree to refrain from using any portion of my (our) workshop presentation as a platform to promote products or services, solicit funds or take political positions. I agree to convey my (our) remarks without bias toward race, gender, religion, political party, ethnicity or sexual orientation. I agree that submitting this proposal for conducting a workshop for ATD Tulsa indicates agreement to comply with the guidelines and expectations stated in the RFP.



Signature of Proposed Presenter

08/02/2019

Date