ATD TULSA CHAPTER — Association for Talent Development

Board Meeting Agenda

Date & Time: Thursday, March 8, 2022, from 4:30 PM to 6:30 PM
Location: Virtual via Zoom

1) Call Meeting to Order - President
2) Roll Call - VP of Administration
3) Confirm Quorum – Declare if Quorum is or is not Present (51% of board members)
4) Guests Present - Acknowledge and Record
5) Agenda for March 8, 2022, Board Meeting – Review and Approve

Board of Directors – President

6) Minutes from February 8, 2022, Board Meeting – Review and Approve (attached)
   a) Post January minutes to website
7) Communications/New Board Member's email
8) New Board member on-boarding-Schedule
9) Wild Apricot Access & Training- Schedule
10) Bylaws and Policies Committee – Schedule
    a) Immediate Past President, the President, and three members of the Board of Directors appointed by the President.
    b) Policies- ARTICLE XIII – VICE PRESIDENT OF MARKETING
    c) Risk Assessment
11) NAC Meeting (operational plan item)–
    a) February NAC participation report- VP Membership
       i) No March Call
12) ATD22- Only one reported registration, Kim Boggs.
13) Susan Donnelly, COC-ATD President-Meet March 15.

Governance – President

14) Operational Plan-
15) 2021 Annual Report Update- Past President (attached)

Financial - President

16) Financial Reports as of February 28, 2022 – Review and Accept (attached)
17) Section 20.1.3.3.4 Audit- The audit shall occur no later than 90 days after year end with results reported to the Board of Directors.
18) Section 20.1.3.6.2 Operating Reserve (Adopted 07-11-2014) The Chapter has both a checking and a money market account. The President, President-Elect, and Treasurer are authorized signatories on the accounts. -Vote to approve that Jennifer and Linda be on the financial accounts.

Membership – VP of Membership

19) Monthly Membership Report - Review and Accept (attached)
20) Plans for Member event for March 22, 4:30-5:30- Membership Drive?

Programming – VP of Programming

21) February 18, 2022 – Review and discuss event experience and opportunities for improvement – Survey Report (attached)
22) Pre-Approved Education Provider for ATD CPTD and APTD development credits
    a) New RFP Document (attached)
    b) Zoom report for Attendance
23) Plans for Future Program Meetings
24) March 2021 Program Meeting on March 2022 Program Meeting on March 18, 2022 – Content & Logistics
    a) Workshop Topic:
    b) Accommodations – Virtual via Zoom
    c) Workshop Program –
    d) Board Member Attendance & Participation-
    e) Networking Activity-
    f) Review updated Pre-Program Slides/Responsibilities
    g) Power Membership Promotional Activities – Pick topic from Power member sheet-(attached)
    h) VP Membership- Contact registered power member prior to the program-
        i) Post Meting Evaluation Online Distribution- VP Programming
25) ATD Tulsa Special Programing Event-
    a) Training Delivery/ Instructional design

Communications – VP Communications

26) LinkedIn Update
    a) Numbers- Joined/ interactions
    b) Using the event feature-
        i) Suggested pulling from membership and inviting them to connect
27) Communications Plan for 2022
    a) LinkedIn/newsletters/emails
28) Communications Scheduled for March
    a) New 2022 Board Member
    b) ATD22- Team registration- Report to president@tdtulsa.org
    c) 2021 Annual Report:
        i) Plans to publish annual report by 3-31-22 that includes but is not limited to, membership numbers, list of board members and their positions, financial performance, and progress toward annual goals. Based on information provided in CARE submission
    d) March Program Meeting Announcements and Invitations
    e) Newsletter Content Suggestions
29) Canva process update
30) Sponsorship email template
31) Communications Needs & Opportunities

32) Old Business

33) New Business

34) Confirm Action Items

35) Confirm Dates for Next Two Board Meetings

   a) April 2022 – (needs to be added to ATD Tulsa website calendar)
   b) May 2022 – (needs to be added to ATD Tulsa website calendar)

36) Adjourn Meeting

Board Meeting Minutes
Date & Time: Thursday, February 8, 2022, from 4:30 PM to 6:30 PM
Location: Virtual via Zoom

https://zoom.us/j/94364026887?pwd=N0lYRmxHbDJlM1ZmbndtemprQnlFZz09

Meeting ID: 943 6402 6887   Passcode: 956021

1. Call Meeting to Order – President.
   Meeting called to order at 4:38pm
   a. Roll Call –
   Attendance= President Sunilyn Hertt, VP Membership Kim Boggs, VP Programming Walt Hansmann, VP Communications Andrea Gentis, Past President Linda Jenkins
   b. Confirm Quorum – Declare if Quorum is or is not Present *(51% of board members).*
   Quorum was declared.
   c. Guests Present - Acknowledge and Record.
   No guests.
   d. Agenda for February 4, 2022, Board Meeting – Review and Approve.
   Motion by Kim Boggs and 2nd by Walt Hansmann.
   Discussed to change date of item 1D changed to read February 8, 2022.
   Amended C 1 & 2 under communication, striking from Agenda.
   Item 1 completed for 2022, C2 – annual report is not yet completed and will be posted when completed.
   Items won't be posted to social media.
   Changes were approved and the motion passed.

2. Board of Directors – President
   a. Minutes from January 8/10, 2022, Board Meeting – Review and Approve (attached)
      a. January Board Meeting Action Items –
      Walt gave a detailed review action items from January board meeting.
      Change date on Minutes from 2021 to 2022.
      Walt motioned to approve, Andrea 2nd.
      Each item suggested by Linda to be updated was discussed and accepted.
      Walt added that Item 8 C i, Halelly is misspelled.
      Motion is approved.
   b. ATD Tulsa Email- Communications email error.
   Still not fixed for Andrea. Walt will continue to work with Go Daddy to fix it.
   c. Wild Apricot Access & Training –
   Schedule refresher Wild Apricot training, schedule another session when for new board members once they are voted in.
   Suni discussed time needed to train new folks.
   Linda discussed where things should be stored for finance.
   Walt discussed where to go to see files.
   Will get training scheduled.
   d. Policy and Bylaws meeting- need to get meeting set up.
   Suggest discussing at March meeting when new board members are on board.
   e. Submitted open board applications- Review and Vote

Linda discussed candidates for Finance. Favors Jennifer over Andrew for open position because of Jennifer's experience with finance and audits.

Kim Boggs moved to vote to appoint Stu Ward as VP of Administration; 2nd by Andrea Gentis. No discussion. Motion passed.

Kim Boggs moved to vote for VP, Finance, Andrea 2nd. No discussion. Jennifer Roberson was appointed as VP Finance.

    f. NAC Meeting Attendance

        a. Elizabeth Beckham, NAC

        b. NAC Calendar – (attached)

             i. Jan. meeting was a one on one with Suni, President.

        c. Identify member to attend Friday, February 11, 2022, 11 a - 12 p MT / 12 - 1 p CT – who can attend?
Suni can attend.
Can Kim come? Yes.

3. Governance – President

    a. 2021 Annual Report/Chapter Affiliations Requirements (CARE) Report Update – (attached)
CARE report is done.
Annual report will be completed by March meeting.

    b. Central Repository-
Each Board member is responsible to upload all chapter documents, communications, reports, PowerPoints, etc. to Wild Apricot.
Final docs should be out on the Central Repository in Wild Apricot as editable docs and not PDF.
Goal is that everyone uploads on monthly basis your perspective final documents.

4. Financial – Past President

    a. Financial Reports as of January 2022 – Review and Accept (attached)
Statement of Financial position – Linda reviewed money in account and financial report as per attached.
Monthly income and expense report reviewed as per attached. Income from membership fees and CHIP, Meeting fees, local membership only. Note: 1 person downgraded from PM to Tulsa Only member. Linda made her sponsorship payment for December 2022 meeting in January 2022.
Communication expenses reviewed as per attached. Included paid annual renewal for email accounts. Paid for Survey Monkey. Reimbursed Suni for ATD Tulsa President plaque given to Linda for her commitment last year. Misc expenses included Affinipay, speaker honorariums, one honorarium is still outstanding. Suni will reach out to speaker to cash check please. Reimbursed for mailing fees to Suni. General Liability insurance paid.
ATD OK21 Conference budget shared again because new expenses came in. Reviewed as per attached. Honorariums cashed and postage and mailing. Want to get check cashed ASAP to be able to close out conference budget.
Walt moved to accept Financial Reports. Andrea 2nd. No discussion. Motion approved.

b. **Risk Assessment**.
Per bylaws, audit needs to be done within 90 days of new year starting. Linda states the policy says we have more time than 90 days. Get it scheduled within 90 days but suggests giving 6 months because accounting firms don't want to be rushed and it is their busy time of year. Suni will make a note to look at bylaws vs. policy and potentially update time frame for audit to be done.

c. Sponsorship- VP of Communications

    i. Suni asked Andrea to develop an email communication template for board members to reach out to their professional contacts. Andrea will create an email template. Linda suggests discussing in the sponsorship letter/email the number of people the sponsorship is expected to reach with sponsorship. Email communication goes to all our members 3 times each month. That is 75 people 3 times a month. Sponsors get a posting on LinkedIn too.
Suni suggested everyone consider reaching out to 2 contacts for sponsorship. Tabled until March. Andrea will bring communication back for review in March.

    ii. Explore other avenues for sponsoring chapter member events and functions-VP Membership

5. Membership – VP of Membership

a. Monthly Membership Report - Review and Accept (attached)
Kim presented report.
Discussion - Walt mentioned that membership count was incorrect and includes "Contact Us" member. Membership report will be updated to reflect correct count.
Linda Jenkins made motion to approve amended Membership Report; Andrea Gentis seconded.
Amended Membership Report approved.

b. Update on past-due members-email/phone.
Kim reviewed past due members.

c. Plans for February Membership Event- Plan Day and time, Ideas/suggestions.
Kim asked for suggestions for February membership event. Idea presented by Andrea to host a kickoff for 2022. Linda suggested to make event early March due to being mid-February. Also asked that we be intentional about What's in it for me? Structure with synopsis of annual report, annual survey, based on survey results listing topics wanted. 5 resources for training delivery; 5 resources for instructional design. Also meets CARE requirements. Suni suggested to offer free program meeting to attendees? Everyone liked the ideas presented. Date/time suggested as evening, bring your own happy hour networking to virtual. 4:30-5:30 suggested time. March board meeting is the 8th so that is not a good date. Program meeting is March 18th, so can't do it that date. Member appreciation week starts March 22. That might be a good time to do it. Will plan to do it that week. Will plan for Tuesday, March 22nd 4:30-5:30, virtual happy hour. Promote discounts from ATD. Kim will plan project.

d. Membership Drive – Use this event as a membership drive.
Free event for ATD members, Chapter Members, COC Members. Not free to others.

6. Programming – VP of Programming

   Walt discussed January program survey. We received 5 responses from Program Survey in January. (attached). No surprises from survey. Disappointment that we don't get more participation in survey. Linda mentioned that one person mentioned January program not hands-on. Discussed that everyone has different opinion of hands-on. We feel it was. Not too worried about that comment.

   a. Workshop proposals submitted for consideration – Review and Approval.

      Proposal from Todd Long was unsolicited.

      Linda made motion to accept the program proposal from Todd Long. Suni seconded. No discussion. Motion did not pass.

      Walt is actively searching for leads for ID and Facilitation for programming. March is about Training Delivery so we will look for ID in April. Perhaps how to convert ILT in Classroom to Virtual.

   b. Pre-approval for ATD Credits- Update

      i. Updated RFP.

         Walt is still working on updating the current RFP using template from State Conference and will get back to ATD Credits. Will look at Ambers revised proposal as guide.

         Need to determine how we will count completion. Will probably look at (a.) participating in entire event (b.) responding to survey and (c.) probably including name.

         Also Linda suggested running report to see who attended, what time they logged in and what time they left. Andrea confirmed that Zoom will do that report. Walt is going to investigate that option.

   c. February 2022 Program Meeting - Content & Logistics:

      Walt reported only 5 people registered besides the speakers. Communication has gone out. Kim and Suni not registered. Kim registered 2/10/2022. Andrea mentioned Linked In invite sent to several people. Suni has class in OKC so she is tentative but will try to attend.

      i. Workshop Topic.

      ii. Workshop Program

         1. Add Slides to Program Meeting Power Point

            a. Suni asked that we include a slide on Volunteer Opportunities. Also add info about International Conference.

            b. Power Membership highlight-(attached)

               i. Membership (Kim) will contact a power member that is attending monthly meeting. Kim to find a power member minute person for program.

               ii. Slide to welcome new board members.

      iii. Board Member Attendance & Participation. Kim and Suni need to register. Encourage new board members to attend.

      iv. Networking Activity – removed from agenda and talk to Kim in March.

   d. Pitch for Future Monthly Programming (RFP and Calendar of available dates).

      Walt has feelers out for speakers on ATD sites. Looking for professional development instructional design and training.

e. Sunilyn reached out to Susan Donnelly, COC-ATD President.
Suni will be more pointed with her and will have answers about COC State Conference for our next meeting.

f. International ATD Conference 2022- Sunilyn contacted Lauren.
We need to get communication out about contacting Suni about the ATD Conference 2022 team rate. Put something on website and next newsletter.

    i. Make a slide for monthly program

    ii. Walt said we don't need 5 people to create the team to get the discount. Linda mentioned, if we identify the 4 and add a 5th to build team. Need to communicate on team rate and where we are with number of people attending.

Communications –

a. Communications Scheduled for February.
Andrea discussed 2 additional emails will go out. Reminders will be set to go out 1 week before, 2 days before and day of. Walt explained that reminders must be edited with correct Zoom link. When events are created it is a copy from previous month. Reminders only go to the registered folks. Meeting reminders go out at time of event. The last one has to go the day before and will go at time of the event.
Reminders go at time of event, for example day before at time of event. Discussion that day of email will not be sent. Not needed.
Andrea will make a post about Member Appreciation Week, and post for new board members.

b. Communications Plan for 2022
Andrea met with Michelle with St Louis VP of communication. Andrea will try to model her communications calendar.

    1. Canva Update- We are trying to get nonprofit for membership. St Louis got rejected. Andrea asked if we could get all the necessary paperwork in order to get approved as nonprofit. Walt advised it is all on the website and that we are all nonprofit. Walt explained his struggle with TechSoup, but we got it through. Andrea asked where the files are so she can get process started with Canva. ATD is Inc. Size is based on membership (75). We are a registered nonprofit. Andrea will upload files to Canva site and get process started.

    2. Newsletter, emails, social media posts, member email. Andrea will try to get newsletter out by next week. Andrea asked where the information comes from new members and renewals. Kim sends as part of monthly report and use those. Watch for spelling errors in Kim's reports. 🙁

        i. Non-programming information
        ii. Include power member sales

c. Post Chapter information on website

    1. Including 2022 Approved Budget

    2. Publish 2021 Annual Report: Includes but is not limited to: membership numbers, list of board members and their positions, financial performance, and progress

toward annual goals. Based on information provided in CARE submission.
Discussion on changes to items 1 & 2.

Communications Needs & Opportunities
Andrea asked that we all communicate on LinkedIn. Interact with posts so it builds activity. Suni asked if Andrea needed support. Andrea mentioned our followers are up on LinkedIn. Up 8 in the last 30 days. Starting to use invitation feature to invite people to meetings and LinkedIn interaction. Linda mentioned pulling from membership and inviting them to connect. Discussion on how to share event in linked in
Suni asked Andrea if she needs any help. She has Michelle from St Louis as mentor.

8. Old Business
no old business to discuss.

9. New Business
Suni asked that Linda and Walt give new board members the insight into their positions. Suni will draft letter for Andrew (who was not appointed) and 2 new board members for review. Asks that new board members spend time with Linda and Walt. Stu with Walt and Jennifer with Linda. When Suni has met with them and then pass them off to them.
Linda mentioned that we need 2 people on our account. Linda suggested herself and Jennifer. Suni mentioned we need to update our financial procedures. Walt mentioned that the procedures were written for brick-and-mortar banking. So, we do need to update them. Linda mentioned we need to vote to approve that Jennifer and Linda be on the financial accounts. We will do that at March meeting.
Walt moved to approve adding Jennifer Roberson to Arvest account in addition to Linda Jenkins to Arvest account. 2nd by Andrea Gentis. No discussion. Motion passed.

10. Confirm Action Items
Suni and Andrea, update bio- Completed
Walt schedule WA training- Waiting for new members to come on.
Suni will contact Diane to cash the check- She found the check and said she would cash.
Walt will work with Go Daddy to fix email communications problem- Andrea reports the issue has been fixed.
Kim will work on Member event for March 22, 4:30-5:30
All upload final documents not PDF- This should be done monthly. Program power points, meeting minutes, all reports, etc.- Will check in monthly.
Andrea sponsorship email template
Walt checking for Zoom report
Kim will get power member to discuss PM at meeting
Kim & Suni will register for Feb event- Kim attended and I wasn't able to attend due to training.
Social media and newsletter to discuss ATD 2022 Conference, who to contact for group rate (Still waiting for Lauren's report and Kim is scheduled)
Andrea will work with Walt for communications, post about new board members and employee membership week.
Andrea communication plan. Newsletter next Monday. Post on linked in 2 times per week.
Andrea will work on Canva process and give update in March

Suni will send out communication to new appointed board members and to person not chosen. Completed.

Will meet with new members and then pass them on to Linda and Walt. Suni met with the new board members- updated all current board members 2/15/2022 12:43 PM. Walt/ Linda to meet?

11. Confirm Dates for Next Two Board Meetings- post on website
    a. March 2022 – **March 8th at 4:30 PM to 6:30 PM**
    b. April 2022 – Date and time? We will wait till March to set April meeting.

12. Adjourn Meeting- Meeting adjourned at 7:04pm

2021 Goals

Achieve ATD CARE (Chapter Affiliation Requirements) Plus Status

Sponsor Oklahoma ATD Statewide Conference

Enhance and Increase Membership Engagement

Build Social Media Presence on LinkedIn

Provide Programming in Alignment with ATD Capability Model

Governance

Linda Jenkins
President

Lewana Harris
Past President

Sunilyn Hertt
President-Elect

2021
Board
Members

Rachel Wagner
VP of Administration

Kim Boggs
VP of Membership

Walt Hansmann, CPTD
VP of Programming

Bylaws Amendments Approved by the Membership

1. To strike from the Bylaws the word 'physically' and 'in person' to just say 'meet' in all Articles in the Bylaws where it currently exists
2. Eliminate Article IV (to eliminate the VP of Digital Media position)
3. Move VP of Digital Media responsibilities to VP of Marketing responsibilities
4. Rename VP of Marketing to VP of Communications
5. Make technical adjustments in the Bylaws text to reflect the above

Finance

TULSA CHAPTER
Association for
Talent Development

Association for Talent Development Tulsa Chapter
Income and Expense Report for 2021

Category Description	2021 Approved Budget	2021 Actual
INCOME		
ATD ChIP/Membership Fees	$ 1,500.00	$ 2,487.82
Meeting Fees	$ 4,000.00	$ 1,810.00
Membership Dues	$ 5,150.00	$ 1,275.00
ATD Meeting Sponsorship	$ 1,000.00	$ 250.00
ATD Newsletter Sponsorship	$ 200.00	$ -
Special Event - Training	$ 3,000.00	$ -
Networking Event Sponsorship	$ 300.00	$ -
Networking Event Fees	$ 400.00	$ 10.00
Special Event - State Conference	$ 10,000.00	$ 6,507.01
Special Event- State Conference Sponsorships	$ 3,000.00	$ 2,000.00
TOTAL INCOME	**$ 28,550.00**	**$ 14,339.83**

Category Description	2021 Approved Budget	2021 Actual
EXPENSES		
Board Expense		
National ATD Dues	$ -	$ 179.00
Retreat	$ 120.00	$ -
ATD Leader's Conference (ALC)	$ 3,500.00	$ 700.00
Treasurer Expense	$ 350.00	$ -
Annual Audit	$ 1,300.00	$ 1,260.00
TOTAL Board Expense	**$ 5,270.00**	**$ 2,139.00**
Communications Expense		
Go Daddy Email	$ 540.00	$ 646.92
Wild Apricot Web Site	$ 1,700.00	$ 1,536.00
SurveyMonkey & Virtual Meeting Subscriptions	$ 808.00	$ 539.95
PO Box Subscription	$ 92.00	$ 118.00
Marketing	$ 250.00	$ -
TOTAL Communications Expense	**$ 3,390.00**	**$ 2,840.87**
Meeting Expense		
Facility Charge	$ 500.00	$ -
Meals-Food	$ 2,000.00	$ -
ATD December Special Program	$ 200.00	$ 123.30
Recognition Items	$ 700.00	$ -
TOTAL Meeting Expense	**$ 3,400.00**	**$ 123.30**
Membership Expense		
Membership Development/Appreciation	$ 400.00	$ 920.82
New Member Appreciation/Recognition	$ 400.00	$ -
TOTAL Membership Expense	**$ 800.00**	**$ 920.82**
Misc. Expenses		
Online Payment Processing Expense	$ 1,000.00	$ 246.06
Oklahoma ATD State Conference	$ 10,000.00	$ 8,962.70
Other Special Event Expense	$ 1,500.00	$ -
Insurance	$ 1,200.00	$ 1,070.24
TOTAL Misc Expense	**$ 13,700.00**	**$ 10,279.00**
TOTAL EXPENSES	**$ 26,560.00**	**$ 16,302.99**
OVERALL TOTAL	**$ 1,990.00**	**$ (1,963.16)**

ATD Tulsa Chapter
Statement of Financial Position as of December 31, 2021

Assets

			Liabilities		
Arvest Checking Account	$	5,531.77	Accounts Payable	$	-
Arvest Money Market Account	$	15,001.82			
Cash	$	73.30	Taxes Payable	$	-
Accounts Receivable in Wild Apricot*	$	-	**Total Liabilities**	$	-
(Less doubtful accounts)**		$0.00			
			Net Assets Unrestricted Net Assets	$ 20,606.89	
			Temporarily Restricted Net Assets	$	-
			Permanently Restricted Net Assets	$	-
Total Cash Assets	$	20,606.89	**Total Net Assets**	$ 20,606.89	
Total Assets	$	20,606.89	**Total Liabilities Plus Net Assets**	$ 20,606.89	

* Accounts Receivable

**Doubtful Accounts are unpaid invoices greater than 90 days old with Unknown Status

Date	Monthly Program Meeting	Number Registered	Number Checked-In	ATD Capabilities
12/10/2021	December: Trainer Throwdown	12	11	Technology Application; Training Delivery and Facilitation; Learning Sciences; Collaboration and Leadership
11/19/2021	November: Three Insights From the ATD International Conference and Exposition (ATD 2021)	10	9	Business Insight; Organizational Development and Culture; Communication; Cultural Awareness and Inclusion; Technology Application; Emotional Intelligence and Decision-Making
9/17/2021	September: All Leadership is Change Leadership: Effective Change Management Strategies in Our New Normal presented by Kimara Mayberry	11	8	Career and Leadership Development; Change Management; Organizational Development
8/20/2021	August: 7 Simple Rules For Making Slides That Make Sense - presented by Wendy Gates Corbett	21	20	Instructional Design; Training Delivery and Facilitation; Technology Application
7/16/2021	July: The Skillset Economy: Leveraging Learning & Development Strategy to Win the Battle for Talent presented by Jon Tota	11	10	Career and Leadership Development, Life Sciences, Training Delivery and Facilitation
6/18/2021	June: Copyright Law for Learning Professionals: Shedding Some Light - Presented by: Barbara C. Ingrassia, MLS, AHIP, CCM, DCL	28	24	Building Personal Capability: Compliance & ethics, Communication, Lifelong Learning Developing Professional Capability: Instructional Design, Knowledge Management, Training Delivery & Facilitation
5/21/2021	May: Tips and Tricks for Training in Zoom	20	16	Training Delivery and Facilitation; Technology Application; Future Readiness
4/23/2021	April: Results Through Relationship Intelligence with Strength Deployment Inventory 2.0	32	21	Communication; Collaboration and Leadership; Emotional Intelligence and Decision Making
3/19/2021	March: The Power of Performance Feedback presented by Amber Vanderburg	18	16	Communication, EQ & Decision Making, Collaboration & Leadership, Organizational Development & Culture, Cultural Awareness & Inclusion, Talent Strategy & Management, Performance Improvement, Career & Leadership Development, Change Management, Lifelong Learning, Coaching, Data & Analytics, Evaluating Impact, Future Readiness
2/19/2021	February: Create Level 2 Quizzes & Tests That Actually Measure Something presented by Ken Phillips, CPTD	26	24	Evaluating Impact, Skill In Creating Data Collection Tools, and Knowledge of Models And Methods For Assessing The Impact of Learning and Talent Development Solutions
1/29/2021	January: Insights from the 2020 State of the Industry: Talent Development Benchmarks and Trends by ATD Research	21	13	Lifelong Learning; Collaboration and Leadership; Knowledge Management; Data and Analytics
	Total for 11 Program Meetings	210	172	
	Average	**19.09**	**15.64**	

Insights from the 2020 State of the Industry: Talent Development Benchmarks and Trends by ATD Research

Presented by:
ATD Tulsa Board of Directors
Virtual Event (Zoom)
Friday, January 29, 2021

11:45 AM CST: *Welcome and Announcements*
12:00 PM to 1:00PM CST: *2020 STATE OF THE INDUSTRY presentation*
1:00 PM to 1:30 PM CST: *Networking Activity by Topic*

FREE for ATD Tulsa Members
$10 for Guests

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TDTulsa.org   Admin@TDTulsa.org

Create Level 2 Quizzes & Tests That Actually Measure Something

Virtual Event via **zoom**

Presented by

Ken Phillips, CPTD
Founder and CEO of Phillips Associates

✓ **Friday, February 19, 2021** from 11:45 AM to 1:30 PM CST with *Create Level 2 Quizzes & Tests That Actually Measure Something* from 12 PM to 1 PM CST
✓ **$10** for ATD Tulsa Members & **$20** for Guests
✓ Register Online @ **https://tdtulsa.org**

Event attendees will learn practical tips and guidelines on how to write Level 2 test questions that produce valued data with *emphasis* on writing test questions that measure job application and not the mere recall of facts.

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Power of Performance Feedback

Virtual Event via **zoom**

Presented by

Amber Vanderburg
Founder of The Pathwayz Group

✓ **Friday, March 19, 2021** from 11:45 AM to 1:30 PM CST with *Power of Performance Feedback* from 12 PM to 1 PM CST
✓ **$10** for ATD Tulsa Members & **$20** for Guests
✓ Register Online @ **https://tdtulsa.org**

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Results Through Relationship Intelligence with Strength Deployment Inventory 2.0

Virtual Event via **zoom**

Presented by

Michael Brown
Master Facilitator
CoreStrengths

✓ **Friday, April 23, 2021** from 11:45 AM to 1:30 PM CDT with **Results Through Relationship Intelligence with Strength Deployment Inventory 2.0** from 12 PM to 1:15 PM CDT
✓ **$10** for ATD Tulsa & COC-ATD Members - **$20** for Guests
✓ Register Online @ **https://tdtulsa.org**

Presented by

Kyle Menig
Master Facilitator
CoreStrengths

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Thank You!!

We are grateful to Walt Hansmann, CPTD, VP of Programming, Linda Jenkins, President, and Kim Boggs, VP of Membership for sharing their tips & tricks for training in **zoom** with everyone during our May Program meeting!!

Topics Covered During *Tips & Tricks for Training in* **zoom**

Annotation Tools	Security Features
Breakout Rooms	Visual Settings
Polls	Whiteboards

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Copyright Law for Learning Professionals: Shedding Some Light

Virtual Event via **zoom**

Presented by

Barbara C. Ingrassia, MLS, AHIP, CCM, DCL
President, Manage Copyright

- ✓ **Friday, June 18, 2021**
- ✓ 11:45 AM CDT – Welcome
- ✓ 12 PM CDT - **Copyright Law for Learning Professionals: Shedding Some Light**
- ✓ 1 PM to 1:30 PM CDT - Networking
- ✓ **$10** for ATD Tulsa & COC-ATD Members
- ✓ **$20** for Guests
- ✓ Register Online @ **https://tdtulsa.org**

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Association for Talent Development

Mission: *Empower Professionals to Develop Talent in the Workplace*

TDTulsa.org   Admin@TDTulsa.org

The Skillset Economy
Leveraging Learning & Development Strategy to Win the Battle for Talent

Register NOW!

This Photo by Unknown Author is licensed under CC BY-NC

Jon Tota
Founder and CEO, Syntax + Motion, Host, The Learning Life Show, Rockstar Learning Evangelist, eLearning Brothers

Program Objectives

➢ Identify the job roles most vulnerable to machine automation

➢ Design a career-pathed certification program to engage learners in their own skillset development

➢ Infuse real-world rewards into learning programs to drive learner adoption and retention

Friday, July 16, 2021, 12 PM to 1 PM CDT, Virtual via Zoom, $10 for ATD Tulsa & COC-ATD Members

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7 Simple Rules For Making Slides That Make Sense

Virtual Event via **zoom**

Presented by

Wendy Gates Corbett
President and Chief Presentation Officer
Refresher Training, LLC /
Signature Presentations, LLC

- ✓ **Friday, August 20, 2021**
- ✓ 11:45 AM CDT – Welcome & Announcements
- ✓ 12 PM CDT – **7 Simple Rules for Making Slides That Make Sense**
- ✓ 1 PM to 1:30 PM CDT - Networking
- ✓ **$10** for ATD Tulsa & COC-ATD Members & **$20** for Guests
- ✓ Register Online @ **https://tdtulsa.org**

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All Leadership is Change Leadership: Effective Change Management Strategies in Our New Normal

Virtual Event via zoom

✓ **Friday, September 17, 2021** from 11:45 AM to 1:30 PM CDT with - **All Leadership is Change Leadership: Effective Change Management Strategies in Our New Normal** - from 12 PM to 1 PM CDT
✓ **$10** for ATD Tulsa & COC-ATD Members - **$20** for Guests
✓ Register Online @ **https://tdtulsa.org**

Presented by:
Kimara Mayberry
Human Resources Training and Development Coordinator for Clark Construction Company, and Founder & Principal Consultant for Platinum Consulting Group

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ATD 2021 Cubed!
3 Insights from 3 Sessions at the ATD International Conference and Expo from 3 ATD Tulsa Members!

Virtual Event via zoom

✓ **Friday, November 19, 2021** from 11:45 AM to 1:30 PM CDT with **ATD 2021 Cubed** from 12 PM to 1 PM CDT
✓ **$10** for ATD Tulsa & COC-ATD Members - **$20** for Guests
✓ Register Online @ **https://tdtulsa.org**

Andrea Gentis

"Engaging Virtual Training"

Sunilyn Hertt

"Let's Dance: Developing Inclusive Training Content With Diversity and Accessibility in Mind"

Stuart Ward

Psychological Safety: A Primer for Everyone"

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Thank You for Joining Us to Celebrate ATD Employee Learning Week at Our Annual

ATD TULSA CHAPTER TRAINER THROWDOWN

Thank You to Our Event Sponsor!

Linda Jenkins

JENKINS CONSULTING GROUP

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Congratulations to *Emory Lazenby*, winner of the ATD Tulsa 2021 Trainer Throwdown. Watch a clip of her winning presentation below.

2021 Trainer Throwdown Winner

ATD Tulsa 2021 Trainer Throwdown Winner Emor...

Possible Solutions:
- Limited menu with specialization
- Market fresh, in season options
- Create best experience
- Focus on ambience

Limited Menu Restaurant

Watch on ▶ YouTube

Comunications

TULSA CHAPTER
Association for
Talent Development

ATD Tulsa Chapter Newsletter, October 2021

TULSA CHAPTER
Association for Talent Development

Newsletter

CHAPTER NEWS

NOTE: Images may be hyperlinks to additional details!

2022 Board of Directors Election Results

The ballots have been cast and our members have elected *Andrea Gentis*, *Kim Boggs*, and *Walt Hansmann* to serve with president *Sunilyn Hertt*, and past president *Linda Jenkins* on the 2022 ATD Tulsa Board of Directors. Congratulations!

Congratulations!

Elected to Serve on the ATD Tulsa 2022 Board of Directors

Andrea Gentis
VP of Marketing

Kim Boggs
VP of Membership

Walt Hansmann, CPTD
VP of Programming

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atd 21 — Salt Lake City Aug 29 – Sept 1
https://atdconference.td.org/welcome

Join the ATD Tulsa Chapter Team @ ATD21!

Andrea Gentis, Mid-Continent Group

Stu Ward, Coca-Cola Business Services

Jennifer Roberson, Stinnett & Associates

Suni Hertt, Tulsa County

Myra Fanning, John Zink Institute

Shelby Morris, Oklahoma State University

ATD21 HQ

ATD21 @HOME

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LinkedIn

ATD Tulsa invites you to join us on our **ATD Tulsa Chapter, Inc. LinkedIn Business Page** so you do not miss any of our communications.

We are hosting the virtual 2021 ATD Oklahoma Statewide Conference in October!
We have a theme - Building Your Skills in Integrating Accessibility and Equity Principles into Your Talent Development Strategies and Initiatives

Want to join our conference planning team or have ideas to share? Contact Suni Hertt, President-Elect at president-elect@tdtulsa.org or Kim Boggs, VP of Membership at membership@dtulsa.org.

TULSA CHAPTER Association for Talent Development

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in
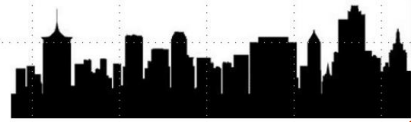
ATD Tulsa Chapter, Inc.
129 followers
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ATD Tulsa Chapter, Inc. Members -

Since we haven't hosted an in person event since February 2020, we're ir ...see more

August Member Event

Start Your Day With Us *In Person* and *Outside*!

atd TULSA CHAPTER
Association for
Talent Development

Date: August 27, 2021

Time: 7:30 am – 8:30 am CDT

Location: Neighborhood Jam
4830 E 61st, Suite 300 (61st & Yale)

We will meet outside on the patio and enjoy breakfast treats and informal networking.

Members FREE ● Guests $10

🏷 with **You** and 5 others

👍❤️ 6 · 5 comments

👍 Like   💬 Comment   ↗ Share   ✈ Send

...lsa Chapter, Inc.
...9 followers
1w · 🌐

...h season of thanks, we #thankyou, our loyal ATD Tulsa Chapter, Inc. members
...ends of #ATDTulsa, for your continued support and encouragement. We
...ciate your feedback and guidance as we have navigated chapter op ...see more

A T D   T U L S A

T H A N K S

Y O U

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...h You and 5 others

...You and 6 others   1 comment

Celebrate   💬 Comment   ↗ Share   ✈ Send

Examples

Examples

ATD Tulsa Membership Report as of January 1, 2021	
Membership Level	**#**
Power Member (ATD + ATD Tulsa)	45
Associate Member (ATD Tulsa only)	39
Student Power Member (ATD + ATD Tulsa)	--
Student Member (ATD Tulsa only)	2
Total ATD Tulsa Membership	**86**
Percent Power Member	**52%**

ATD Tulsa Membership Report as of December 31, 2021	
Membership Level	**#**
Power Member (ATD + ATD Tulsa)	51
Associate Member (ATD Tulsa only)	21
Student Power Member (ATD + ATD Tulsa)	1
Student Member (ATD Tulsa only)	1
Total ATD Tulsa Membership	**74**
Percent Power Member	**69%**

August Member Event

Start Your Day With Us *In Person* and *Outside*!

atd TULSA CHAPTER
Association for
Talent Development

Date: August 27, 2021
Time: 7:30 am – 8:30 am CDT
Location: Neighborhood Jam
4830 E 61st, Suite 300 (61st & Yale)

We will meet outside on the patio
and enjoy breakfast treats and
informal networking.

Members FREE ● Guests $10

Special Member Event

Virtual Event via zoom

Please join us for an hour of networking with an opportunity to discuss the results from our 2020 Annual Membership Survey.

- Tuesday, February 23, 2021 from 5:00 PM to 6:00 PM CST
- **FREE** to Members and $10 for Guests
- Preregistration Required @ https://tdtulsa.org/

ATD TULSA CHAPTER Association for Talent Development

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JUNE SPECIAL MEMBER EVENT

Topic: The Value of ATD Membership

Presenter: Brandon Grubesky, Director, Membership, Association for Talent Development (ATD)

Where: Virtual via Zoom

Date: Tuesday, June 29, 2021

Time: 3:30 PM - 4:30 PM CDT

Cost: FREE for ATD Tulsa & COC-ATD Members & $10 for Guests

Pre-registration: Required Online at https://tdtulsa.org/

atd MEMBERSHIP BENEFITS

- TD magazine and archives
- Unlimited access to TD at Work guides NEW
- Annual State of the Industry report
- Growing library of tools, checklists, and templates 80+ available in Spanish
- Webinars and conference session recordings
- Discounts on all ATD products and services
- 99 micro courses Professional Plus Only NEW
- Unlimited access to 10-Minute Case Studies and whitepapers
- Member-only newsletters
- EBSCO Online Library access

ATD TULSA CHAPTER Association for Talent Development

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We ♥♥ Our Members

We Appreciate YOU!

Happy Holidays 2021

ATD TULSA CHAPTER Association for Talent Development

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Get Your Kicks on Route 66

End Your Workday With Us *In Person* and *Outside* at Our September Member Event!

MOTHER ROAD 66 MARKET

Date: Tuesday, September 28, 2021
Time: 4 PM – 6 PM CDT
Location: Mother Road Market, 1124 S. Lewis Ave., Tulsa, OK 74104

We will meet outside on the patio and enjoy treats from Mother Road Market restaurants and informal networking.

ATD Tulsa Members - FREE & Guests - $10

Mission Accomplished!

☑ **Achieved ATD CARE (Chapter Affiliation Requirements) Plus Status**

☑ **Sponsored Oklahoma ATD Statewide Conference – *Accessibility By Design***

☑ **Enhanced and Increased Membership Engagement**

☑ **Built Social Media Presence on LinkedIn**

☑ **Provided Programming in Alignment with ATD Capability Model**

Thank you for reading our ATD Tulsa 2021 Annual Report! If you have any comments or questions, contact Linda Jenkins, Past President at past-president@tdtulsa.org or 918-808-6935.

Mission and Vision

Empower Professionals to Develop Talent in the Workplace

Create a World that Works Better

Annual Goals

Meet Care Plus Certification   Increase Power Membership   Programming Members Want   Increase Revenue

Board of Directors			
Category	**Elements**	**Board Lead**	**Notes**
Board of Directors - CARE Plus	Board Member Onboarding: Chapter provides a defined orientation/onboarding process for new board members.	President	The President will schedule one-on-one meetings with new board members. Sharing documents and information, along with giving information seeking assignments to complete.
Board of Directors - CARE Plus	National Advisor for Chapters (NAC) Area Calls: At least one board member (excluding paid administrators) attends a NAC area call.	President	At the monthly board meeting two board members will be designated to attend the NAC area call. Then will report back to the board members the following next month's board meeting.
Board of Directors - CARE Plus	Strategic Planning: Chapter board meets to plan for the future.	President	Strategic Planning sessions will be scheduled, which will be held virtually.
Board of Directors - CARE Plus	Recruitment Strategy: Chapter has a volunteer recruitment strategy in place for positions that support board work.	President	Prior to the start of each monthly program meetings, chapter members will be invited to volunteer for available volunteer opportunities.

Prepared by Sunilyn Hertt, President, ATD Tulsa

Board of Directors - CARE Plus	Succession Plan: Chapter has a succession strategy for identifying and filling board member positions	President	Notification, via email and monthly program meetings, will be given to Chapter members informing them of open board positions, giving an opportunity to volunteer by applying.
Board of Directors - CARE Plus	ATD Chapter Leaders Conference (ALC): Chapter has a board member(s) present at ALC annually.	President	At least one board member will attend ATD ALC 2022, in which the chapter will financially support. We ask any board member that can attend with employer or by self-funding may attend. If the conference is virtual the chapter is prepared to pay for the 2023 ATD Tulsa Board members to attend.

Communication			
Category	**Elements**	**Board Lead**	**Notes**
Communication - CARE Plus	Member Communication: Chapter communicates with its members about non-programming information. This can be included in a blog, vlog, newsletter, etc.	VP Communications	The chapter will communicate with members about both non-programing and programing information on a regular basis. Ensuring to follow ATD logo/color guidelines. We will also use Canva for non-profit organizations. Communications: programming emails, special event emails, social media posts, newsletters among other types.
Communication - CARE Plus	Communication Strategy: Chapter has a targeted communication strategy and plan (including social media) to communicate with chapter prospects and members.	VP Communications / VP Programming	Develop a communications calendar of all communications to ensure regular and steady communication flow to future and current chapter members. Communications: programming emails, special event emails, social media posts, newsletters among other types.
Communication - CARE Plus	Employee Learning Week (ELW): Chapter participates in and promotes ELW.	VP Programming/ VP Membership	There will be a special event planned for ELW, planning will be started June 2022.

Prepared by Sunilyn Hertt, President, ATD Tulsa

Finance

Category	Elements	Board Lead	Notes
Finance - CARE Plus	Cash Reserve: Chapter has approximately three to six months of operating expenses set aside for emergencies.	VP Finance	Maintain approximately three to six months of operating expenses set aside for emergencies.
Finance - CARE Plus	Risk Assessment: Chapter board completes a risk assessment and reviews it annually.	Bylaws & Policies Committee	Will be scheduled in the 1st quarter and completed by the 2nd quarter as it will influence tasks to be completed during rest of the year.
Finance - CARE Plus	Financial Support for Board Development: Chapter budgets to send board members to the ALC, and/or covers the cost of ATD membership.	VP Finance	The chapter will budget to send at least one board member to the ALC.
Finance - CARE Plus	Sponsorship: Chapter has sponsors to support chapter programming and operations.	All Board Members	We plan to develop an email communication template for board members to reach out to their professional contacts.

VP of Communications will reach out to organizations that weren't able to sponsor the 2021 ATD OK Statewide Conference and expressed interest in sponsoring future events.

VP of Membership, with the assistance of other board members, will explore other avenues for sponsoring chapter member events and functions. |

Governance			
Category	**Elements**	**Board Lead**	**Notes**
Governance - CARE Plus	Standard Operating Procedures (SOPs): Chapter board maintains and updates its SOPs annually or as needed throughout the year.	Bylaws & Policies Committee	Per bylaws, President will establish Bylaws & Policies Committee, will complete a risk assessment and schedule first meeting by the end of the 1st Quarter 2022.
Governance - CARE Plus	Bylaws Review: Chapter board reviews its bylaws annually, including a review of the bylaws as part of board member onboarding.	President & Bylaws & Policies Committee	Bylaws reviewed as part of operational planning process and new board member onboarding.
Governance - CARE Plus	Board Transparency: Chapter makes board meeting minutes/summaries available to members.	President/VP Administration	Until the VP of Administration position is filled, the President will assign a board member to take meeting minutes and they will upload the meeting documents to the chapter's website. All members will have the ability to attend board meetings by registering via the chapter website. This invitation will be communicated during the monthly program meetings, in the monthly newsletter and via the chapter website.
Governance - CARE Plus	Central Repository: Board maintains a central repository or document library for archiving important chapter documents.	All Board Members	All members will use their provided email to use for any TD Tulsa communications and or to complete other board member responsibilities. All board members must read the document retention policy. Board members will upload any TD Tulsa documents and or work products within Wild Apricot to archive. All 2022 documents will be uploaded no later than 12/31/2022. Documents: meeting minutes, monthly newsletters, social media posts, email communications, risk assessment, operational plan, monthly program PowerPoints, RFPs and any other document that would provide any historical knowledge or insight for future Board members.

Membership			
Category	**Elements**	**Board Lead**	**Notes**
Membership – CARE Plus	Recognition: Chapter has a member/volunteer recognition or spotlight program.	VP Membership/ VP Communication	Celebrate chapter member recognition week March 22 to 29th, event will be decided at the February board member meeting. The board will request that members share both personal and professional accomplishments to share during monthly program meetings and share via LinkedIn.
Membership - CARE Plus	Services: Chapter offers a job board, consultant referral service, resume workshop, or other service(s) not included in your chapter's member benefit.	VP Communications	Maintain the member's only job board along with adding other Member's only content.
Membership - CARE Plus	New Member Orientation: Chapter hosts an orientation for new members.	VP Membership	The VP of Membership will continue to welcome new members by sending a personal email explaining membership features along with offering to meet, virtually or by phone, to explain the website and answer any other questions they might have.
Membership - CARE Plus	Chapter Membership on the ATD Sore: Chapter makes its membership available on the TD.org website.	VP Membership/ VP Communications	ATD Tulsa membership will continue to be available via the TD.org website, along with other membership sales.
Membership - CARE Plus	Volunteer Recruitment: Chapter creates awareness about volunteering for the chapter and open positions.	All Board Members	Notification, via email and monthly program meetings, will be given to Chapter members informing them of open board positions, giving an opportunity to volunteer by applying. Will use emails, events, newsletters, and social media to inform and invite members to volunteer to serve on committees. Recognize volunteers during national Volunteer Week and the One Week Only Power Membership sale in April 2022.
Membership - CARE Plus	Power Membership: Chapter achieves a Power Membership rate of 45 percent or higher and the 20 Power Member minimum.	VP Membership	Continue to maintain Power Membership by promoting ATD discount promotions and other Power Member benefits throughout the year. At each monthly program meeting provide a Power Minute, asking a member to share a benefit or how they leverage their Power Membership.

Prepared by Sunilyn Hertt, President, ATD Tulsa

Membership - CARE Plus	Membership Campaign: Chapter holds a membership drive to recruit prospective members.	President/ VP Membership	Offer an open house at least one time in 2022. First targeting non-joint members, chapter members or national members, convert them to power members.
Membership - CARE Plus	Member Benefits & Power Member Promotion: Participate in ATD Member Appreciation Month - March 22–26.	VP Membership/ VP Communications	Celebrate Member Appreciation Month and communicate the Member Appreciation Sale.

Programming			
Category	**Elements**	**Board Lead**	**Notes**
Programming - CARE Plus	ATD Capability Model: Chapter uses the ATD Capability Model in program development.	VP Programming	The chapter will become preapproved to offer programs that qualify for recertification and initial professional development points for the APTD and CPTD credentials by the end of 2022.
Programming - CARE Plus	Expanded Programming: Chapter hosts more than six professional development events each year.	VP Programming	There will be at least 11 monthly programs and one special programing events offered in 2022.
Programming - CARE Plus	Chapter or Regional Conference: Chapter hosts or partners with other local chapters to host a conference for its members and prospects.	All Board Members	Central Oklahoma Chapter is scheduled to host the 2022 Oklahoma statewide conference. Will partner with Central OK Chapter financially as well as at least one board member to support the effort. If there is not an OK state conference, we will look to partner in with other ATD Chapters in our region to host a conference.

Strategic Planning			
Category	**Elements**	**Board Lead**	**Notes**
Board of Directors & Governance	B-Vacancy - Identify vacant positions that may be filled and solicit members to fill positions.	President	Current vacancies = President Elect, VP of Accommodations, VP of Finance & VP of Administration
Board of Directors & Governance	Transparency - Provides notification to membership of date/time/location of board meetings with invitation to attend.	VP of Administration	Increase knowledge of board roles, responsibilities, and actions by posting board agendas and inviting Chapter members to attend.
Board of Directors & Governance	Board Transparency: Chapter makes board meeting minutes/summaries available to members.	President	Chapter members will be encouraged to review posted board member documents and to attend monthly board member meetings.
Board of Directors & Governance	Central Repository: Board maintains a central repository or document library for archiving important chapter documents.	All Board Members	ATD Tulsa documents and or work product will be uploaded within Wild Apricot to archive, to provide historical insight for future Board members.
Board of Directors & Governance	Standard Operating Procedures (SOPs): Chapter board maintains and updates its SOPs annually or as needed throughout the year.	Bylaws & Policies Committee	The Bylaws & Policies Committee will complete a risk assessment and ensure policies and bylaws reflect virtual practices.

Prepared by Sunilyn Hertt, President, ATD Tulsa

2022 NAC Area Call Schedule

JANUARY
No Call - 1:1 Coaching Calls with NAC

FEBRUAY
Friday, February 11, 2022
11 a - 12 p MT / 12 - 1 p CT

APRIL
Friday, April 8, 2022
11 a - 12 p MT / 12 - 1 p CT

JUNE
Friday, June 10, 2022
11 a - 12 p MT / 12 - 1 p CT

AUGUST
Friday, August 12, 2022
11 a - 12 p MT / 12 - 1 p CT

OCTOBER
Friday, October 14, 2022
11 a - 12 p MT / 12 - 1 p CT

DECEMBER
Friday, December 9, 2022
11 a - 12 p MT / 12 - 1 p CT

ATD Tulsa Chapter
Statement of Financial Position as of February 28, 2022

Assets			**Liabilities**		
Arvest Checking Account	$	5,047.53		Accounts Payable	$ -
Arvest Money Market Account	$	15,002.55			
Cash	$	73.30		Taxes Payable	$ -
Accounts Receivable in Wild Apricot*	$	300.00	**Total Liabilities**		$ -
(Less doubtful accounts)**		$0.00			
			Net Assets	Unrestricted Net Assets	$ 20,423.38
				Temporarily Restricted Net Assets	$ -
				Permanently Restricted Net Assets	$ -
Total Cash Assets	$	20,423.38	**Total Net Assets**		$ 20,423.38
Total Assets	$	20,423.38	**Total Liabilities Plus Net Assets**		$ 20,423.38

* Accounts Receivable: Invoices for March 2022 Program meeting for OU (15 registrations). OU will not pay invoice until training is provided.

**Doubtful Accounts are unpaid invoices greater than 90 days old with Unknown Status

Prepared by Linda Jenkins, 2022 Past President on 3-3-22

Association for Talent Development Tulsa Chapter
Monthly Income and Expense Report - February 2022

Category Description	2020 Actual	2021 Approved Budget	2021 Actual	2022 Budget	Feb-22	Year-to-Date (YTD)	Difference (Budget - YTD)	Notes
INCOME								
ATD ChIP/Membership Fees	$ 2,208.09	$ 1,500.00	$ 2,487.82	$ 2,500.00	$ 200.00	$ 690.00	$ 1,810.00	4 Power Membership Income from ATD ($50 each)
Meeting Fees	$ 3,730.00	$ 4,000.00	$ 1,810.00	$ 4,000.00	$ 130.00	$ 190.00	$ 3,810.00	$130 for Feb 22 Program Meeting
Membership Dues	$ 2,875.00	$ 5,150.00	$ 1,275.00	$ 1,250.00	$ 100.00	$ 250.00	$ 1,000.00	2 ATD Tulsa Chapter Memberships ($50 each)
ATD Meeting Sponsorship	$ 250.00	$ 1,000.00	$ 250.00	$ 1,000.00		$ 250.00	$ 750.00	
ATD Newsletter Sponsorship	$ -	$ 200.00	$ -	$ 200.00		$ -	$ 200.00	
Special Event - Training	$ -	$ 3,000.00	$ -	$ 3,000.00		$ -	$ 3,000.00	
Networking Event Sponsorship	$ -	$ 300.00	$ -	$ 300.00		$ -	$ 300.00	
Networking Event Fees	$ 190.00	$ 400.00	$ 10.00	$ 100.00		$ -	$ 100.00	
Special Event - State Conference	$ -	$ 10,000.00	$ 6,507.01	$ -		$ -	$ -	
Special Event- State Conference Sponsorships	$ -	$ 3,000.00	$ 2,000.00	$ -		$ -	$ -	
TOTAL INCOME	$ 9,253.09	$ 28,550.00	$ 14,339.83	$ 12,350.00	$ 430.00	$ 1,380.00	$ 10,970.00	
EXPENSES						$ -	$ -	
Board Expense						$ -	$ -	
National ATD Dues	$ -	$ -	$ 179.00	$ -		$ -	$ -	
Retreat	$ -	$ 120.00	$ -	$ -		$ -	$ -	
ATD Leader's Conference (ALC)	$ 700.00	$ 3,500.00	$ 700.00	$ 1,750.00		$ -	$ 1,750.00	
Treasurer Expense	$ 7.50	$ 350.00	$ -	$ 60.00		$ -	$ 60.00	
Annual Audit	$ 1,200.00	$ 1,300.00	$ 1,260.00	$ 1,500.00		$ -	$ 1,500.00	
TOTAL Board Expense	$ 1,907.50	$ 5,270.00	$ 2,139.00	$ 3,310.00	$ -	$ -	$ 3,310.00	
Communications Expense						$ -	$ -	
GoDaddy Domains	$ 84.68	$ -	$ -	$ 169.36		$ -	$ 169.36	
Go Daddy Email	$ 119.76	$ 540.00	$ 646.92	$ 700.00		$ 503.16	$ 196.84	Annual renewal for 7 of 9 ATD Tulsa board member email accounts.
Wild Apricot Web Site	$ 1,536.00	$ 1,700.00	$ 1,536.00	$ 1,824.00		$ -	$ 1,824.00	
SurveyMonkey & Virtual Meeting Subscriptions	$ 408.00	$ 808.00	$ 539.95	$ 608.00		$ 408.00	$ 200.00	Auto renewal for annual SurveyMonkey subscription to be paid on 1/10/22 via Visa debit card ($408).
PO Box Subscription	$ 92.00	$ 92.00	$ 118.00	$ 118.00	$ 156.00	$ 156.00	$ (38.00)	
Marketing	$ -	$ 250.00	$ -	$ -		$ -	$ -	
TOTAL Communications Expense	$ 2,240.44	$ 3,390.00	$ 2,840.87	$ 3,419.36	$ 156.00	$ 1,067.16	$ 2,352.20	
Meeting Expense						$ -	$ -	
Annual ATD Program Certification Expense				$ 100.00		$ -	$ 100.00	
Facility Charge	$ 220.00	$ 500.00	$ -	$ -		$ -	$ -	
Meals-Food	$ 778.11	$ 2,000.00	$ -	$ -		$ -	$ -	
ATD December Special Program	$ 141.69	$ 200.00	$ 123.30	$ 250.00		$ -	$ 250.00	
Recognition Items	$ -	$ 700.00	$ -	$ 600.00		$ 46.00	$ 554.00	$46 for plaque presented to ATD Tulsa 2021 President in Dec 2021
TOTAL Meeting Expense	$ 1,139.80	$ 3,400.00	$ 123.30	$ 850.00	$ -	$ 46.00	$ 804.00	
	$ -							
Membership Expense						$ -	$ -	

Association for Talent Development Tulsa Chapter
Monthly Income and Expense Report - February 2022

Name Badges	$ 309.73	$ -	$ -	$ -		$ -	$ -	
Membership Development/Appreciation	$ 200.00	$ 400.00	$ 920.82	$ 1,000.00		$ -	$ 1,000.00	
New Member Appreciation/Recognition	$ -	$ 400.00	$ -	$ -		$ -	$ -	
TOTAL Membership Expense	$ 509.73	$ 800.00	$ 920.82	$ 1,000.00	$ -	$ -	$ 1,000.00	
	$ -							
Misc. Expenses						$ -	$ -	
Online Payment Processing Expense	$ 280.70	$ 1,000.00	$ 246.06	$ 350.00	$ 16.60	$ 20.37	329.63	Monthly expenses from AffiniPay for processing payments via ATD Tulsa website (Wild Apricot)
Oklahoma ATD State Conference	$ -	$ 10,000.00	$ 8,962.70	$ 1,000.00	$ 200.00	$ 629.07	370.93	$200 for 1 $200 ATDOK21 Speaker Honorarium.
Other Special Event Expense	$ -	$ 1,500.00	$ -	$ 1,000.00		$ -	1,000.00	
Insurance	$ 970.60	$ 1,200.00	$ 1,070.24	$ 1,200.00	$ 50.82	$ 101.64	1,098.36	Monthly general liability insurance payment
TOTAL Misc Expense	$ 1,251.30	$ 13,700.00	$ 10,279.00	$ 3,550.00	$ 267.42	$ 751.08	$ 2,798.92	
	$ -							
TOTAL EXPENSES	$ 7,048.77	$ 26,560.00	$ 16,302.99	$ 12,129.36	$ 423.42	$ 1,864.24	$ 10,265.12	
	$ -							
OVERALL TOTAL	$ 2,204.32	$ 1,990.00	$ (1,963.16)	$ 220.64	$ 6.58	$ (484.24)	$ 704.88	

Prepared by Linda Jenkins, 2022 Past-President on 3-3-22

2021 Oklahoma ATD Statewide Virtual Conference Budget

| Category Description	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Total	Notes
Income									
Registrations									
$60 - ATD Tulsa Early Bird	$360.00	$60.00	$30.00					$450.00	8 Registrations with 1 @ $30 in WA by month
$60 - COC-ATD Early Bird								$0.00	
$80 - ATD & ATD Chapter Early Bird								$0.00	
$100 - Guest Early Bird	$100.00							$100.00	1 Registration in WA by month
$60 - Student/Unemployed			$120.00					$120.00	2 Registrations including 1 ATD Tulsa Member & 1 OU Student/Employee in WA by month
$100 - ATD Tulsa Regular		$100.00	$400.00					$500.00	5 Registrations in WA by month
$100 - COC-ATD Regular		$200.00	$2,000.00					$2,200.00	22 Registrations including 14 from OU in WA by month
$120 - ATD & ATD Chapter Regular		$240.00	$1,320.00					$1,560.00	13 Registrations in WA by month
$140 - Guest Regular		$420.00	$840.00					$1,260.00	9 Registrations in WA by month
Registrations Total	**$460.00**	**$1,020.00**	**$4,710.00**	**$0.00**	**$0.00**			**$6,190.00**	60 Paid Early Bird (9) & Reg. Registrations (51) in WA by month
Sponsorships									
$250 Level								$0.00	
$500 Level	$500.00		$500.00					$1,000.00	Jenkins Consulting Group & BJ Glover Learning & Consulting
$750 Level								$0.00	
$1000 Level			$1,000.00					$1,000.00	COC-ATD Support
Sponsorships Total	**$500.00**	**$0.00**	**$1,500.00**	**$0.00**	**$0.00**			**$2,000.00**	
Miscellaneous	$27.00	$0.01						$27.01	Payment for 2nd Polo (Hansmann) & In-kind Sponsorship ($.01)
Total Income	**$987.00**	**$1,020.01**	**$6,210.00**	**$0.00**	**$0.00**			**$8,217.01**	
Expense									
Training Umbrella				$5,400.00				$5,400.00	

2021 Oklahoma ATD Statewide Virtual Conference Budget

Category Description	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Total	Notes
TSHA, Inc.				$1,608.75				$1,608.75	Sign Language Interpreters
Speaker Honorariums					$1,000.00	$400.00	$200.00	$1,600.00	8 @ $200 each
AffiniPay			$32.08	$170.31				$202.39	Fee for processing payments made through ATD Tulsa website (Wild Apricot)
HRCI Credits		$250.00						$250.00	HRCI Certification Application Fee
Postage & Mailing			$5.80	$42.41		$29.07		$77.28	Mailed polo to BJ, purchased boxes for mailing ATD Kahoot! Game Prizes, mailed 2 Kahoot! Game prizes. $29.07 for mailing Zink Kahoot! Game prize and thank you cards.
Polos	$333.35							$333.35	11 Polos for Committee Members and ATD Tulsa board members
Total Expense	**$333.35**	**$250.00**	**$37.88**	**$7,221.47**	**$1,000.00**	**$429.07**	**$200.00**	**$9,471.77**	
Overall Total	**$653.65**	**$770.01**	**$6,172.12**	**-$7,221.47**	**-$1,000.00**	**-$429.07**	**-$200.00**	**-$1,254.76**	

Prepared by Linda Jenkins, Past President on 3-3-22

Q1 Why did you attend this ATD Tulsa Program Meeting? Check all that apply.
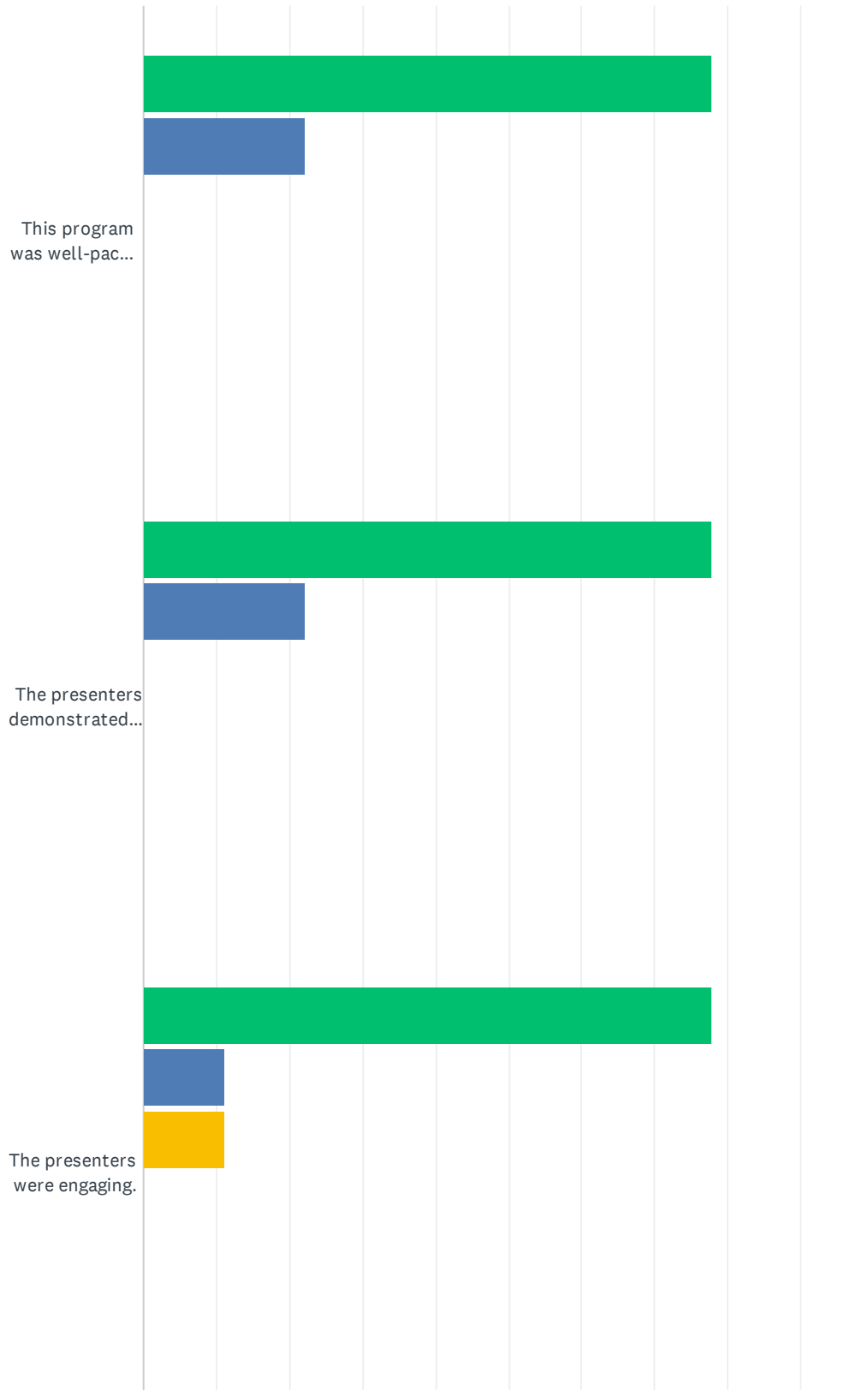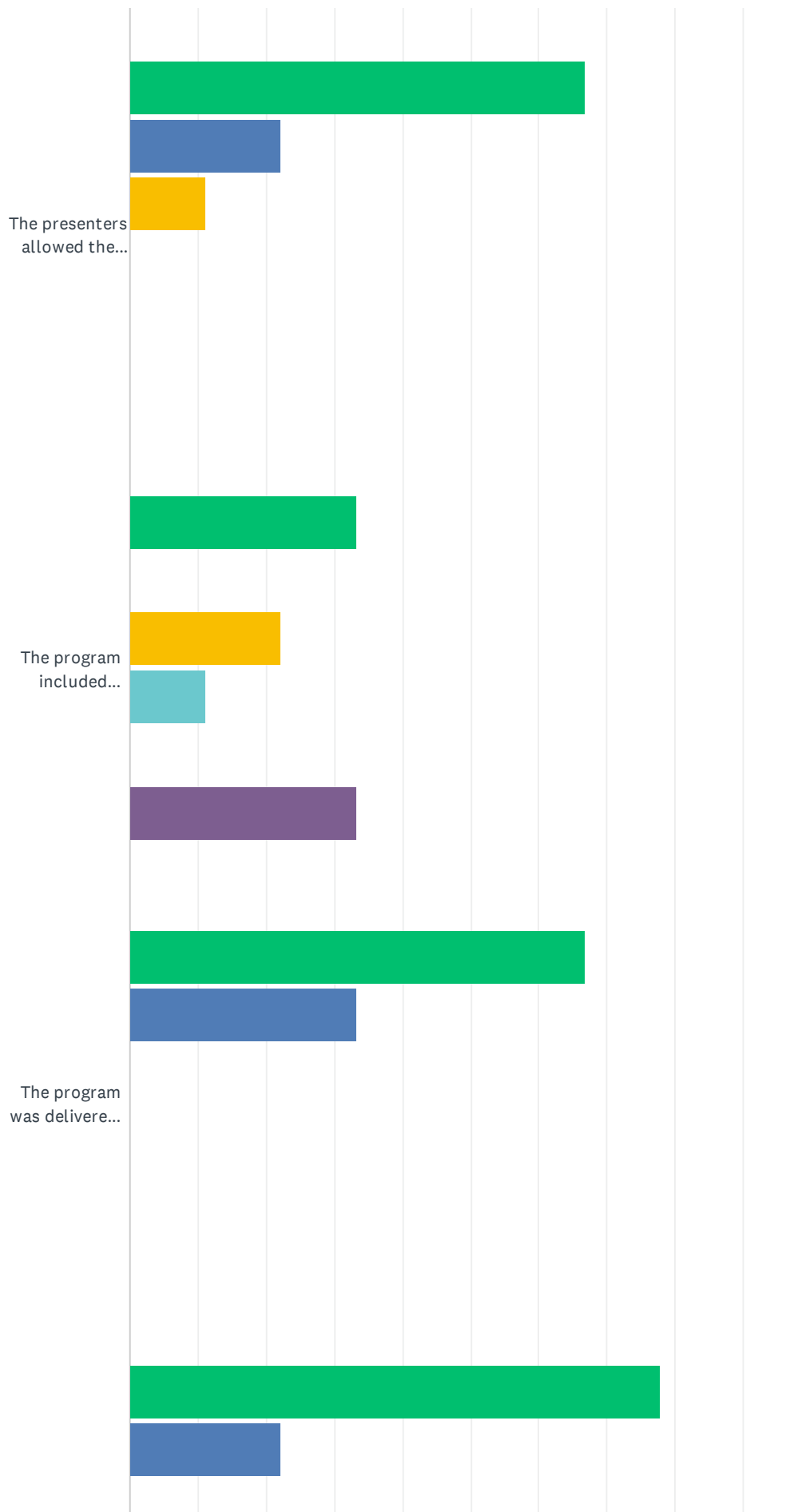
Answered: 9   Skipped: 0
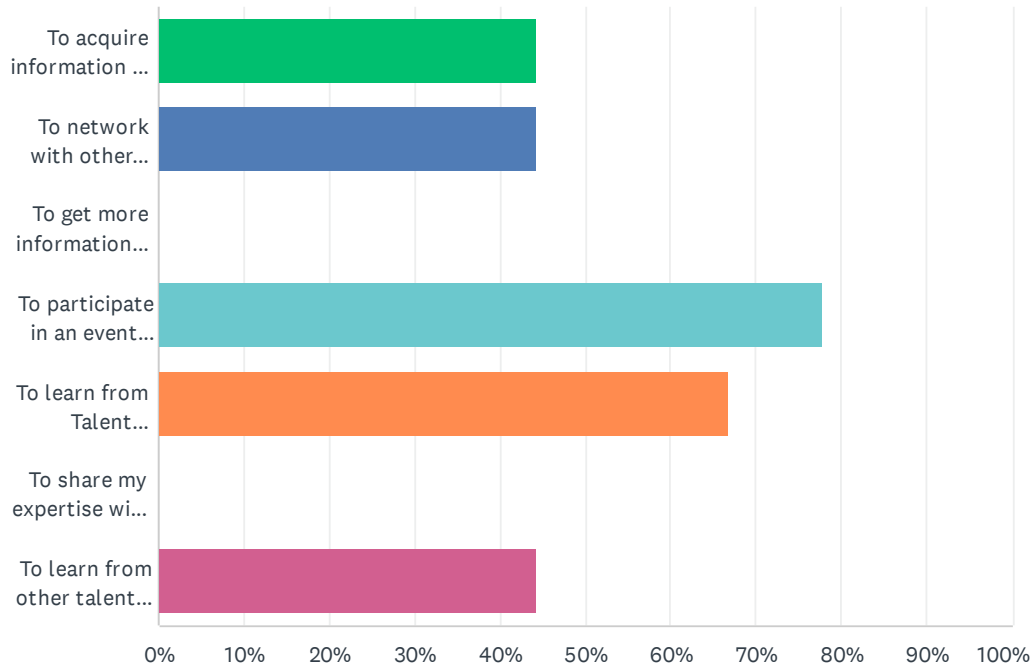
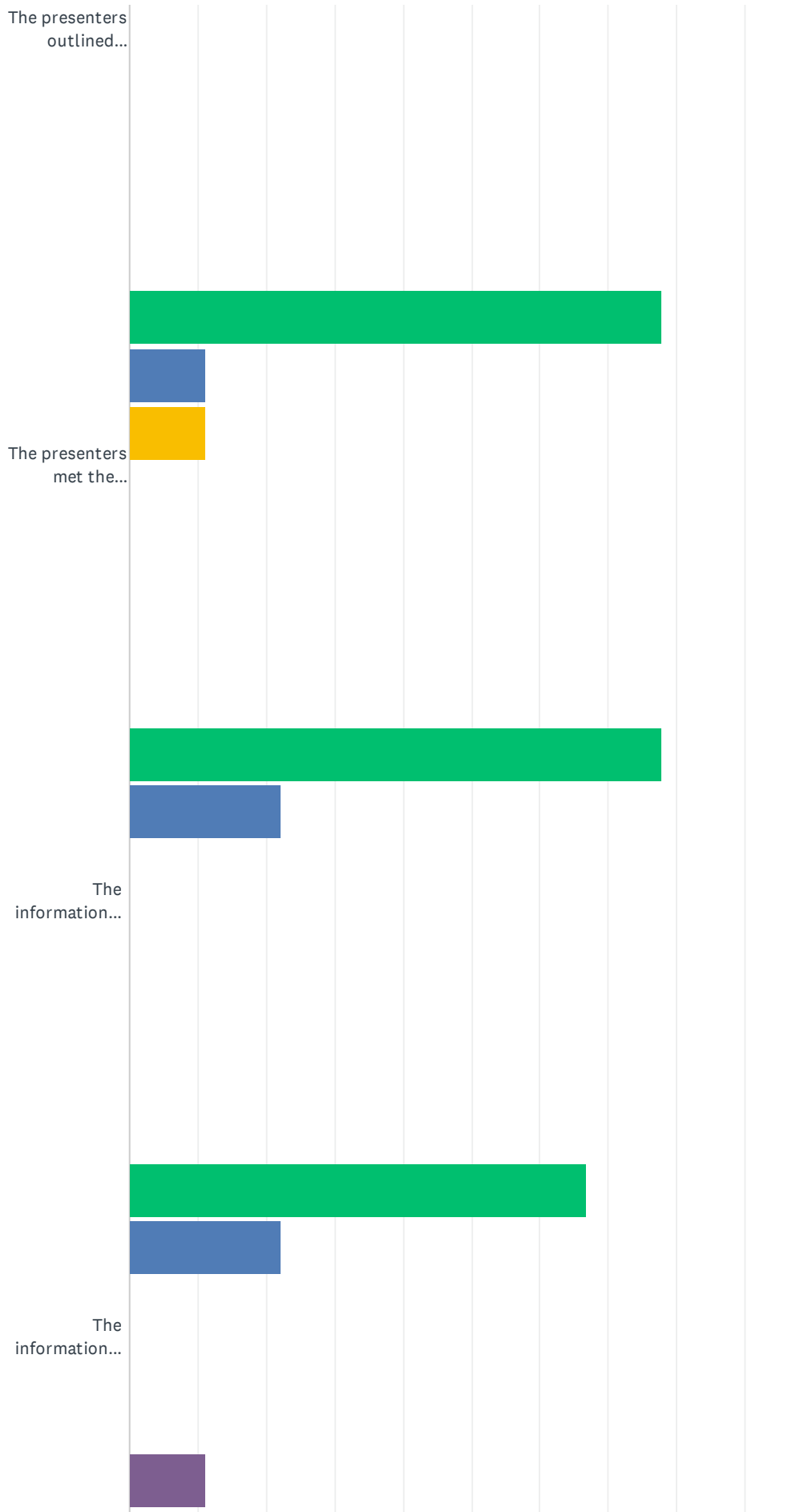| ANSWER CHOICES	RESPONSES	
To acquire information on developments in the talent management industry.	44.44%	4
To network with other talent management professionals.	44.44%	4
To get more information about ATD Tulsa.	0.00%	0
To participate in an event delivered by the presenters.	77.78%	7
To learn from Talent Management industry leaders.	66.67%	6
To share my expertise with other talent management professionals.	0.00%	0
To learn from other talent management professionals attending the program meeting.	44.44%	4
Total Respondents: 9		

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

Q2 Please indicate your level of agreement with the following aspects of the facilitators and workshop content.
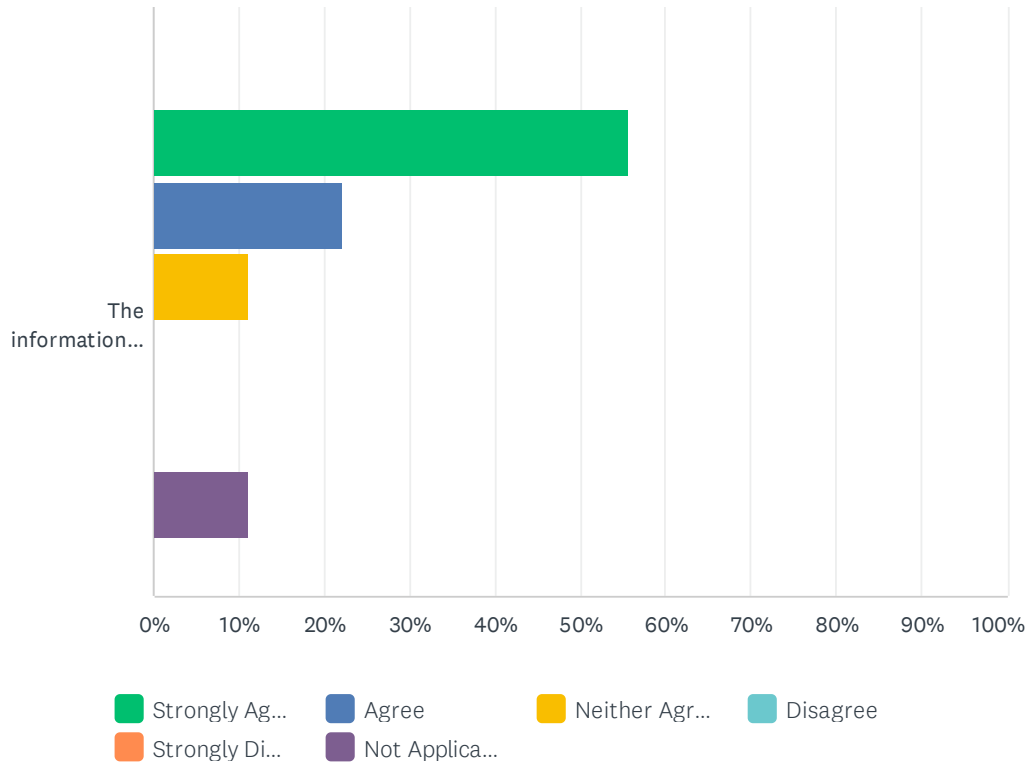
Answered: 9   Skipped: 0

This program
was well-pac...

The presenters
demonstrated...

The presenters
were engaging.

The presenters
outlined...

The presenters
met the...

The
information...

The
information...

Going Solo? Realities and Rewards of Consulting - February 18, 2022

	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.	77.78% 7	22.22% 2	0.00% 0	0.00% 0	0.00% 0	0.00% 0	9
The presenters demonstrated subject matter expertise and knowledge.	77.78% 7	22.22% 2	0.00% 0	0.00% 0	0.00% 0	0.00% 0	9
The presenters were engaging.	77.78% 7	11.11% 1	11.11% 1	0.00% 0	0.00% 0	0.00% 0	9
The presenters allowed the right amount of time for discussion.	66.67% 6	22.22% 2	11.11% 1	0.00% 0	0.00% 0	0.00% 0	9
The program included hands-on learning activities.	33.33% 3	0.00% 0	22.22% 2	11.11% 1	0.00% 0	33.33% 3	9
The program was delivered as promoted.	66.67% 6	33.33% 3	0.00% 0	0.00% 0	0.00% 0	0.00% 0	9
The presenters outlined objectives for their session.	77.78% 7	22.22% 2	0.00% 0	0.00% 0	0.00% 0	0.00% 0	9
The presenters met the objectives as outlined.	77.78% 7	11.11% 1	11.11% 1	0.00% 0	0.00% 0	0.00% 0	9
The information presented during this program was well organized.	77.78% 7	22.22% 2	0.00% 0	0.00% 0	0.00% 0	0.00% 0	9
The information presented during this program is useful to my job.	66.67% 6	22.22% 2	0.00% 0	0.00% 0	0.00% 0	11.11% 1	9
The information presented during this program can be applied to my business.	55.56% 5	22.22% 2	11.11% 1	0.00% 0	0.00% 0	11.11% 1	9

#	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	The only hands-on activity was one poll. I don't have to have hands-on activities every time, but wanted to answer the question appropriately.	2/18/2022 3:43 PM
2	Thank you - I thoroughly enjoyed the presentation! This was my first event with the Tulsa chapter. I was really impressed with the knowledge that was shared and the friendly, supportive collaboration among the presenters and the local Board members.	2/18/2022 1:45 PM

Q3 How likely are you to recommend the program "Going Solo? Realities and Rewards of Consulting" to other organizations?

Answered: 9   Skipped: 0
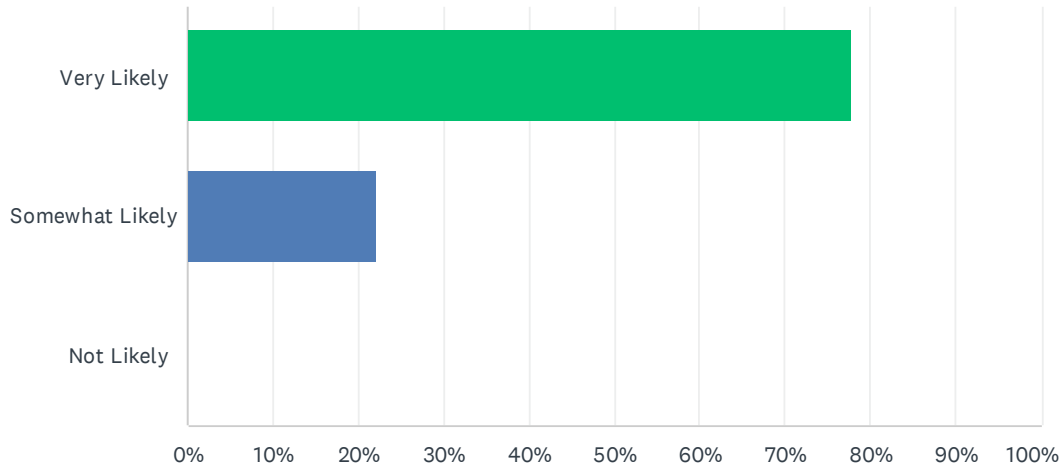
ANSWER CHOICES	RESPONSES	
Very Likely	77.78%	7
Somewhat Likely	22.22%	2
Not Likely	0.00%	0
TOTAL		9

#	IF YOU ANSWERED SOMEWHAT LIKELY OR NOT LIKELY, WHAT COULD WE DO DIFFERENTLY TO CHANGE YOUR RESPONSE TO VERY LIKELY?	DATE
1	uncertain at the moment	2/23/2022 1:19 PM

Q4 What were your top one or two takeaways from this session?

Answered: 7   Skipped: 2

#	RESPONSES	DATE
1	don't be overwhelmed because help is available	2/23/2022 1:19 PM
2	Charge what you're worth & if you're unsure, ease into consulting with a few clients on the side while you work your other job.	2/18/2022 3:43 PM
3	You need a lot of self-discipline and motivation to be a successful consultant.	2/18/2022 3:24 PM
4	Importance of marketing yourself and remembering all of the misc. things needed to run a business that you will have to do on your own.	2/18/2022 2:29 PM
5	Being prepared for the financial realities of consulting; finding a niche.	2/18/2022 2:18 PM
6	I enjoyed hearing about personal experiences and insights and also receiving links to resources.	2/18/2022 1:45 PM
7	I have played with the idea of starting my own consultant business for a long time. This was a great presentation and gave me some good ideas to think about. It also gave me some resources to check out to help me.	2/18/2022 1:38 PM

Q5 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: 9   Skipped: 0
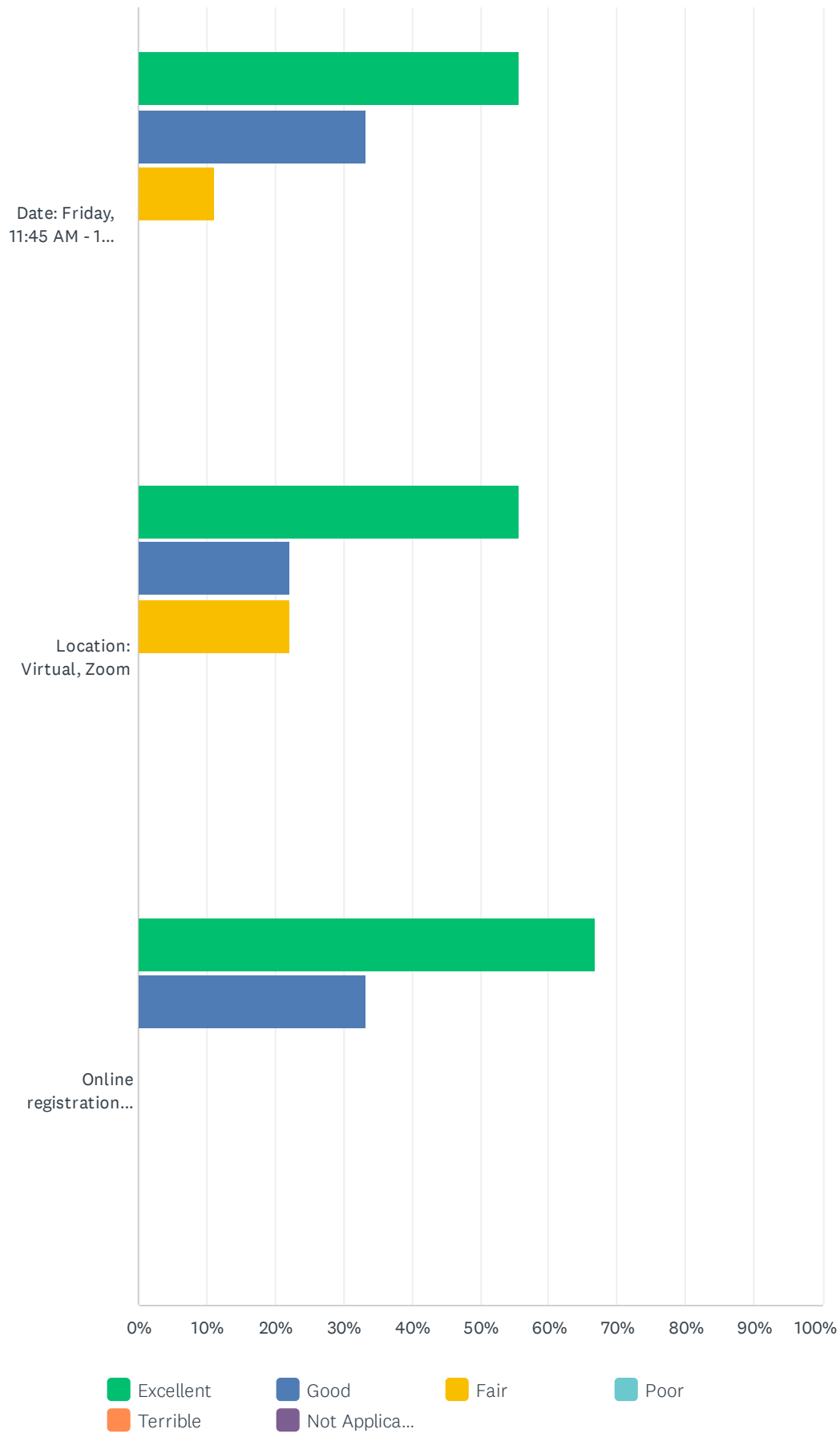
# Going Solo? Realities and Rewards of Consulting - February 18, 2022

	EXCELLENT	GOOD	FAIR	POOR	TERRIBLE	NOT APPLICABLE	TOTAL
Date: Friday, 11:45 AM - 1:15 PM	55.56% 5	33.33% 3	11.11% 1	0.00% 0	0.00% 0	0.00% 0	9
Location: Virtual, Zoom	55.56% 5	22.22% 2	22.22% 2	0.00% 0	0.00% 0	0.00% 0	9
Online registration process	66.67% 6	33.33% 3	0.00% 0	0.00% 0	0.00% 0	0.00% 0	9

#	IF YOU RATED ANY ITEM(S) AS FAIR, POOR OR TERRIBLE, WHAT COULD WE DO DIFFERENTLY TO CHANGE YOUR RATING TO EXCELLENT?	DATE
1	I'm ready to return to in-person meetings.	2/18/2022 3:43 PM
2	Would love to get back to in-person meetings!	2/18/2022 1:38 PM

	EXCELLENT	GOOD	FAIR	POOR	TERRIBLE	NOT APPLICABLE	TOTAL

Q6 Based on your experience at this ATD Tulsa program meeting, how likely are you to attend another program meeting?

Answered: 9   Skipped: 0
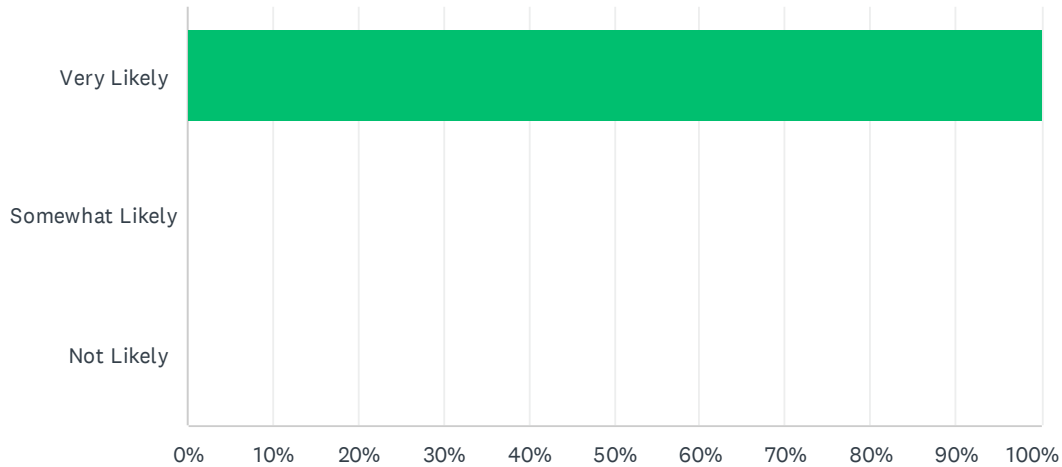
ANSWER CHOICES	RESPONSES	
Very Likely	100.00%	9
Somewhat Likely	0.00%	0
Not Likely	0.00%	0
TOTAL		9

| #	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.	

Q7 Are there trainers, consultants, speakers, companies, or organizations that you would like to have present at a future ATD Tulsa program meeting? If yes, please list them.

Answered: 3   Skipped: 6

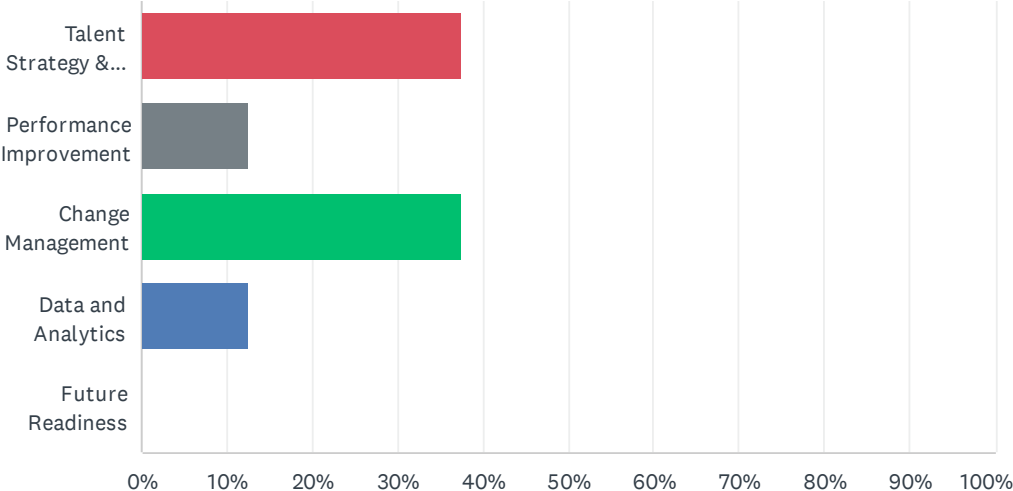| #	RESPONSES	DATE
1	None come to mind	2/23/2022 1:19 PM
2	Can't think of any right now	2/18/2022 2:29 PM
3	It would be nice to hear from a local member about how they adapted classroom training for virtual presentation.	2/18/2022 2:18 PM

Q8 Which of the following ATD Capability Model topics are you most interested in seeing presented? Check all that apply.

Answered: 8   Skipped: 1
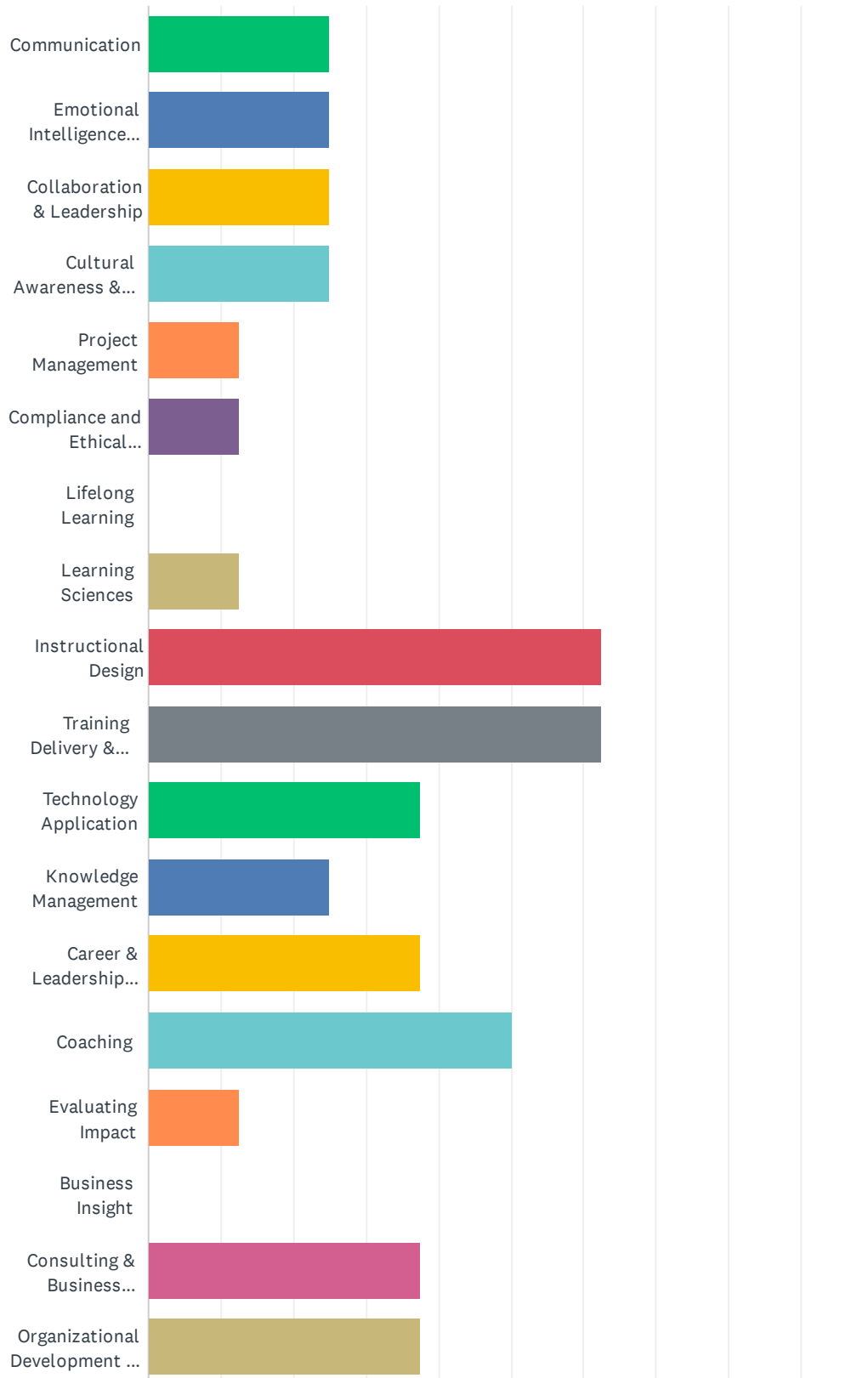
Going Solo? Realities and Rewards of Consulting - February 18, 2022

ANSWER CHOICES	RESPONSES	
Communication	25.00%	2
Emotional Intelligence & Decision Making	25.00%	2
Collaboration & Leadership	25.00%	2
Cultural Awareness & Inclusion	25.00%	2
Project Management	12.50%	1
Compliance and Ethical Behavior	12.50%	1
Lifelong Learning	0.00%	0
Learning Sciences	12.50%	1
Instructional Design	62.50%	5
Training Delivery & Facilitation	62.50%	5
Technology Application	37.50%	3
Knowledge Management	25.00%	2
Career & Leadership Development	37.50%	3
Coaching	50.00%	4
Evaluating Impact	12.50%	1
Business Insight	0.00%	0
Consulting & Business Partnering	37.50%	3
Organizational Development & Culture	37.50%	3
Talent Strategy & Management	37.50%	3
Performance Improvement	12.50%	1
Change Management	37.50%	3
Data and Analytics	12.50%	1
Future Readiness	0.00%	0
Total Respondents: 8		

Q9 Do you have any questions, comments or concerns? (If you would like for us to respond directly, please include your preferred contact information.)

Answered: 2   Skipped: 7

#	RESPONSES	DATE
1	n/a	2/18/2022 2:29 PM
2	Really enjoyed it - thanks! Very happy with my decision to join the Tulsa chapter.	2/18/2022 1:45 PM

ATD TULSA PROFESSIONAL DEVELOPMENT PROGRAMS
REQUEST FOR PROPOSAL FORM

1. **Name/Title/Credentials:** (*to appear in promotional/marketing materials):*
Click or tap here to enter text.

2. **Workshop Title:** *(The workshop title should fit with workshop themes outlined.)*
Click or tap here to enter text.

3. **Describe How Your Presentation Fits Our Program (Theme) which is to advance ATD's Mission to "empower professionals to develop talent in the workplace."**
Click or tap here to enter text.

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

5. **Workshop Description In 300 words or less:** *(It should be written in a format that will help us market your workshop to program attendees.)*
Click or tap here to enter text.

6. List the top three (3) ATD Capability Model topic(s) your workshop addresses
Click or tap here to enter text.

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…"
Click or tap here to enter text.

8. **Workshop Design Plan:**
Include a workshop outline with timeframes and delivery methods for all participant interaction and hands-on activities. Each workshop timeframe is 60- to 75-minutes including time for questions and answers.
Click or tap here to enter text.

9. **Handout / Performance Tools:**

Include a title and description of each handout or item that will be given to participants.

Click or tap here to enter text.

10. **AV and / or Room Configuration Requirements:** *(Not applicable for a virtual program)*

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.

Click or tap here to enter text.

11. **Virtual Presentation Requirements:** *(For virtual presentations)*

The ATD Tulsa Chapter can provide a virtual link to a Zoom session for this event. Or you can provide your own virtual platform link (Zoom, WebEx Meeting, WebEx Training, GoTo Meeting, etc.) The platform must be accessible to participants who may be connecting from a company (corporate) environment.

Click or tap here to enter text.

12. **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.

Click or tap here to enter text.

13. **Demonstration of Presenter Ability:**

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

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.

Click or tap here to enter text.

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

To appear in workshop promotional/marketing materials

Click or tap here to enter text.

15. **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. ATD Tulsa may contact them to get feedback regarding your presentation technique and style. Note: If you have presented at ATD Tulsa in the past, please provide the date and topic in addition, to the three references requested above.

Click or tap here to enter text.

16. **Professional Photo:**

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

For workshop promotional/marketing materials

3rd FRIDAY OF EACH MONTH
Meeting times: 11:30 AM TO 1:30 PM
Presentation times: 12:00 PM to 1:15 PM

PURPOSE

The purpose of this Request for Proposals (RFP) is to solicit proposals for 60- to 75-minute presentations at the ATD Tulsa Monthly Professional Development Programs. Presenters must be willing to provide their services *pro bono publico (without expectation of payment)* for the good of developing talent development professionals and in support of the goals and objectives of ATD Tulsa.

BACKGROUND

ATD Tulsa expects 20 to 40 attendees at each virtual meeting, the majority of whom will include, but are not limited to: training and development, workplace learning, human resources, and organizational development professionals, along with T&D consultants. The meetings take place via virtual delivery platform. We typically host events via our chapter Zoom account. We try to keep the atmosphere one of fun and learning in a casual business environment, with numerous opportunities for professional development and networking.

All qualified persons are encouraged to submit proposals. ATD Tulsa does not discriminate against individuals based on race, creed, national origin, gender, physical or mental ability, color, or sexual orientation.

SESSION DEVELOPMENT

ATD Tulsa Monthly Professional Development Programs are learning experiences first and foremost, and as such, must be noncommercial in content and delivery. Your primary goal should be the attendee's learning experience rather than a showcase of your ideas, products, or services. You will gain exposure for yourself or organization by providing something tangible for participants to take away. The more you can put yourself in their place while developing your session, the better your chances are of being selected as a speaker.

When developing your proposal submission, make sure the content is informative and relevant, with clear and immediate application to the learner's work. Ask yourself how the learner will be able to apply your session content back on the job. Your session must use best practices to engage learners in a virtual environment. We look for sessions that include participant interaction or that have hands-on activities and methods to support learning within the session framework.

WORKSHOP THEMES/TOPICS

ATD Tulsa Monthly Professional Development Programs should focus on "empowering professionals to develop talent in the workplace." Based on ATD Tulsa Member feedback, there are specific areas of the ATD Capability Model (pictured below) upon which we have chosen to focus: Instructional Design; Training Delivery and Facilitation; Technology Application, and Change Management. For example, members have asked for a session on how to convert their classroom content to engaging virtual content, which encompasses both Instructional Design and Technology Application.

Building Personal Capability	Developing Professional Capability	Impacting Organizational Capability
• Communication	• Learning Sciences	• Business Insight
• EQ & Decision Making	• Instructional Design	• Consulting & Business Partnering
• Collaboration & Leadership	• Training Delivery & Facilitation	• Organizational Development & Culture
• Cultural Awareness & Inclusion	• Technology Application	• Talent Strategy & Management
• Project Management	• Knowledge Management	• Performance Improvement
• Compliance & ethics	• Career & Leadership Development	• Change Management
• Lifelong Learning	• Coaching	• Data & Analytics
	• Evaluating Impact	• Future Readiness

SPEAKER BENEFITS
1. Complimentary meeting registration if your proposal is accepted. (Expenses are not reimbursed.)
2. Contribution to your industry and profession.
3. Networking with peers and industry professionals.
4. Valuable professional exposure.
5. A copy of your workshop evaluations.

SPEAKER EXPECTATIONS
1. Conduct a 60-to 75-minute interactive workshop that engages the audience with appropriate time allowed for questions and answers.
2. Contribute all services in a pro bono publico (without expectation of payment) capacity.
3. Meet all deadlines.
4. No change to the workshop topic, title, description, or objectives as originally submitted without written permission from the VP of Programming.
5. No change to the identity of the speaker(s) without written permission from the VP of Programming.
6. Provide the workshop materials electronically in PDF format by 5 pm the Friday before the workshop for use on the day of the workshop. Copyright remains with the author.
7. Provide copies of any handouts that workshop participants may need to effectively engage in workshop activities. The VP of Programming will provide speakers with an estimated number of workshop participants by 5 PM on the Wednesday before the workshop.
8. Agree to allow ATD Tulsa to video record your session. The recording will be made available to registered attendees, both those who were in attendance, and those who registered, but were unable to attend live.
9. Agree to grant ATD Tulsa permission to use video and/or still images taken of you during the Professional Development meeting which includes your presentation in any and all publications, including website and social media, without payment or any other consideration in perpetuity.
10. Agree to refrain from using any portion of your workshop presentation as a platform to promote products or services, solicit funds, or take political positions.
11. ATD Tulsa makes a concerted, ongoing effort to be a diverse and inclusive organization. Therefore, you must agree to convey your remarks without bias toward race, gender, religion, political party, ethnicity, or sexual orientation. You may use humor in your remarks, but do so with caution and good taste.
12. Agree that submitting a proposal for conducting a workshop for ATD Tulsa indicates agreement to comply with the guidelines and expectations stated herein.

PROPOSAL SUBMISSION INSTRUCTIONS
1. Complete the entire Request for Proposals Form. Each proposal should include the completed and signed Workshop Proposal Presenter Agreement, Workshop Proposal Form and a color headshot photo of the presenter(s) (JPEG).
2. Submit the Form, Agreement, and photo as a PDF and JPEG via email to programming@tdtulsa.org and copy the ATD Tulsa President at president@tdtulsa.org.

ATD TULSA PROFESSIONAL DEVELOPMENT PROGRAMS
SPEAKER AGREEMENT

Speaker / Presenter Information

Primary Presenter Name	
Co-Presenter Name (if any)	
Workshop Title	

Please complete the below based on the primary presenter.

Phone	Primary#:	Co-presenter#:
Email Address		
Title		
Company or Organization		
Mailing Address		
City, State, Zip		

Statement of Understanding

By signing this proposal information sheet:

1. I acknowledge that if my proposal is accepted by ATD Tulsa, I will provide workshop speaking services *pro bono publico* in support of the goals and objectives of ATD Tulsa.
2. I agree to indemnify and hold ATD Tulsa harmless from any liability.
3. 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.
4. I agree to convey my (our) remarks without bias toward race, gender, religion, political party, ethnicity or sexual orientation.
5. I agree to allow ATD Tulsa to video record my session, with recording made available to registrants.
6. I agree to grant ATD Tulsa permission to use video and/or still images taken of me during the event in any and all publications, including website and social media, without payment or any other consideration in perpetuity.
7. 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   **Date**

_____   _____

Signature of Proposed Co-Presenter   **Date**

3. The subject line of the email should read, *Proposal for ATD Tulsa Professional Development Program*.
4. Submitted proposals will become the property of ATD Tulsa and will not be returned. Proprietary or confidential information included in proposals must be conspicuously stated in the proposals.
5. Applicants should receive an email confirming receipt for their Professional Development Program Proposal submission with 5 business days. If no confirming email is received, contact the Programming VP at programming@tdtulsa.org and copy the ATD Tulsa President at president@tdtulsa.org to confirm receipt by ATD Tulsa.
6. Proposals will not be opened publicly. However, all offerors who submit proposals will be notified if the proposal has or has not been accepted for an ATD Tulsa Professional Development Program.

IF YOU HAVE QUESTIONS

Offerors may address questions about this RFP to the Programming VP by email at programming@tdtulsa.org and copy to the ATD Tulsa President at president@tdtulsa.org.