

Date & Time: Thursday, May 10, 2022 from 4:00 PM to 6:00 PM

Location: Virtual via Zoom

1. Call Meeting to Order - President
 - a. Board Meeting Minutes- Assign a Board member
 - b. Roll Call – President
 - i. Board member resignation- Stu Ward, VP of Administration.
 - c. Confirm Quorum – Declare if Quorum is or is not Present (*51% of board members*)
 - d. Guests Present - Acknowledge and Record
 - e. Agenda for May 10, 2022 Board Meeting – Review and Approve (attached)
2. Board of Directors – President
 - a. Minutes from April 7, 2022 Board Meeting – Review and Approve (attached)
 - b. Bylaws & Policies Committee Meeting – Schedule date for next meeting – President
 - c. NAC Meeting – President-Elect
 - 1) April NAC participation report – Andrea G. attended.
 - 2) Identify at least one member to attend May meeting on May.
 - 3) Identify at least one member to attend June meeting on June
 - 4) Dates for virtual ALC 2021 – Oct. 20-22 in Arlington, VA.
3. Governance – President
 - a. Board Elections- prepare for elections committee
 - b. Uploading documents into WildApricot.
4. Financial - President
 - a. Financial Reports as of April 30, 2021 – Review and Accept (attached)
5. M&M Consulting Partners PLLC- will we be going with them this year, we will need to vote request proposal
6. Membership – VP of Membership
 - b. Monthly Membership Report - Review and Accept (attached)
 - a. Membership Event- days' time location?
 - i. Membership drive- correspondence, discuss the approach/promotion-free program pass
 - b. Power Membership Promotional Activities – Power Member Minute and ATD ICE
7. Programming – VP of Programming
 - c. April Program Meeting –Survey Report (attached)
 - a. Plans for May Program Meeting - Content & Logistics: Ken Phillips, Level 3 Evaluations Made Simple, Credible, and Actionable, material prior to the program
 - i. Board Member Attendance & Participation
 - d. Special Program Event-Sardek Love- RFP- Review and Accept (attached)
 - e. Plans for Future Program Meetings- Review and Accept (attached)
 - i. RFP- Kimberly Cofrancesco, Brian Lanza- *7 Fundamentals of Effective eLearning*
8. Communications –
 - a. LinkedIn Update
 1. Event Attendee Outreach

2. #ATD22Tulsa Conference Hashtag for Chapter Team members
 - b. NAC SW Area Call Update
 - c. Communications calendar- (attached)
 - d. May Newsletter
 - e. Sponsorship Email Template
 - f. Communications Needs/Assistance

9. Old Business

10. New Business

11. Confirm Action Items

12. Confirm Dates for Next Two Board Meetings
 - a. Date for June Meeting –
 - b. Date Options for July Board Meeting –

13. Adjourn Meeting

Date & Time: Thursday, April 7, 2022 from 4:00 PM to 6:00 PM

Location: Virtual via Zoom

<https://us06web.zoom.us/j/92426333438?pwd=MkNRb3FKY1pmMTkxMkg1dVV3NjdJdz09>

Meeting ID: 924 2633 3438 Passcode: 616057

1. Call Meeting to Order - President
 - a. Board Meeting Minutes – Meeting was recorded in the absences of the VP of Administration
 - b. Roll Call – President called to order at **4:05**

Attendance: Sunilyn Hertt, President, Linda Jenkins, Past President, Walt Hannsman, VP of Programing, Jennifer Roberson, VP of Financing, Andrea Gentis, VP of Communications, Kim Boggs, VP of Membership, Absence: Stu Ward, VP of Administration

- c. Confirm Quorum –Quorum was declared
- d. Guests Present – NO Guests
- e. Agenda for April 7, 2022 Board Meeting – Review and Approve

Agenda is accepted and seconded with the following additions to section 6:

- f. Ken Phillips RFP
 - g. Pat Michaels RFP
2. Board of Directors – President
 - a. Minutes from March 8, 2022 Board Meeting – Review and Approve (**attached**)

Motioned to approve, seconded, one abstention, passed

- b. January & February 2022 Approved meeting minutes need posted to WildApricot.
 - c. NAC Meeting
 - 1) Identify at least one member to attend April meeting- Friday, April 8, 2022, 12 - 1 p CT – Andrea will attend.
3. Governance – President
 - a. CARE Plus Achieved- Kudos to Linda!
 - b. Schedule bylaws/policy meeting- first meeting review risk assessment process- April 20, 4:30pm-6:00pm.
 - c. New Chapter Relations- Jacalyn Lombardi. Suni will need to get Jennifer’s information to ATD.
 - d. ATD22 TEAM- Kim, Suni, Andrea confirmed, registered. Suni will reach out to Jeremy Smith, Kristen Cox and Stu Ward to see if they were registered.
 4. Financial - President
 - a. ARVEST Visit- Linda/Jennifer
 - b. Financial Reports as of March 31, 2022 – Review and Accept (**attached**)

Report reviewed, motion to accept, seconded, passed

5. Membership – VP of Membership
 - a. Monthly Membership Report - Review and Accept (**attached**)
Two members with pending renewals, one new member.

Report reviewed, motion to accept, seconded, passed

- b. March Membership event- Thought participants were well engaged, would have liked more members joining in. This helps meet two CARE requirements.
- c. Plans for next Membership Meeting
 - i. Membership drive- focusing on ATD national members that aren't Local Chapter members, correspondence, reaching out to those ATD members. Ideas- First meeting is free. Be in alignment with an ATD promotion. (Summer sale) Something in person and outdoors. Everyone – have think of ideas for dates and locations, Kim will work on a template for email correspondence for our targeted members.
- 6. Programming – VP of Programming
 - a. April 2022 Program Meeting -
 - i. Workshop Topic: Kassy LaBorie – Irresistible Virtual Training RFP (attached), Walt will be getting with Kassy for a specific date for the April session.

Motion to accept, seconded, approved

- ii. Power Membership Promotional Activities – Power Member Minute and ATD ICE- VP of Membership
- b. APTD/CPTD Recertification Preapproved by ATD.
 - i. *New RPF form-Have been using the new form with the upcoming speakers, Walt is sending out an example and explaining why we are needing this specific information. Walt reports it seems to be going well.*
 - ii. *Program survey updated- defined what hands-on activity mean and gave examples, added the certification notice from ATD, added name and email for the credit. Linda, required questions suggested, (2) Likert scale questions and (4) two take-a-ways*

Motion to accept, seconded, approved,

- iii. *Zoom Reporting feature update*
- c. Plans for Future Program Meetings (attached)
 - i. There are several
- d. Special Event Update- topic/dates- Sardek Love, July 9,2022, waiting for an RFP for the training. We will discuss price point next board meeting.
- e. Hybrid program- Member survey members want to hybrid meetings, how can we offer this for our members? Walt will be going to look at OSU Tulsa and other locations. Jennifer has suggested her place of employment for less than 25 people and could possible meet with Walt to view locations.
- f. Ken Phillips RFP- Level 3 Evaluations
Motion to accept proposal, seconded, approved, passed
- g. Pat Michaels RFP- Creating Guidebooks
Motion to accept proposal, seconded, approved, passed

Motion to accept, seconded, approved, more detail about in person even to come

- 7. Communications –
 - a. LinkedIn Update

- b. Communications Scheduled for April: this calendar is very flexible.
 - i. April is ATD Membership Appreciation Month
 - ii. ATD Volunteer Recognition Week - 04/18 to 04/22
- c. Requesting board member 'testimonials' to share
- d. Canva Account Update- Uploaded the ATD Brand Kit, all members
- e. Sponsorship communication-(**attached**)- We are looking for all types of sponsorships. We need to discuss going forward.

Motion to accept, seconded, approved

- 8. Old Business- none
- 9. New Business- none
- 10. Confirm Action Items
 - Suni will reach out to ATD members about ATD '22 to get a team together
 - Bylaws meeting April 20
 - Walt will check with OSU and Asberry Church
 - Suni will contact Susan
 - Kim will reach out to power member after April meeting, possibly online and in public, video/quote
 - Andrea will add a poll to linked in ATD hybrid/in person
 - Andrea will attend NAC meeting
 - Kim will contact Rachelle and Heather about membership
 - Kim is making communications for international members for a drive
 - Planning for the Outdoor Networking event "Free Pass Meeting"
 - Engage on LinkedIn with ATD
 - Everyone – have think of ideas for dates and locations
- 11. Confirm Dates for Next Two Board Meetings
 - a. May 10, 2022- 4:30 to 6:30 pm
 - b. Schedule June meeting
- 12. Adjourn Meeting **at 6:01pm**

**ATD Tulsa Policy 11.1.1 – Job Postings on the ATD Tulsa Chapter Web Site
(Adopted 04-01-2015)**

As a service to the Talent Development community within Northeast Oklahoma, we will provide companies or organizations seeking talent development professionals the ability to post job notices or advertisements on our website with the following stipulations:

- A.** The Vice President of Marketing Communications will be the primary point of contact and will be responsible for posting and removing these notices;
- B.** Notices must be for positions related to Training, Talent, and Organizational Development. This may include Human Resource positions. Positions should have some relation to skills contained within the ATD Competency Capability Model;
- C.** These notices will be posted for a maximum of 30 days or for the duration of the posting, whichever is shorter. Extensions may be requested beyond 30 days with the approval of the Vice President of Marketing Communications;
- D.** Postings must contain a link for applicants to apply and a general disclaimer must be posted on the webpage releasing ATD Tulsa or ATD International of any obligation or responsibility;
- E.** Terms and conditions will be posted on the ATD Tulsa Website.

CHAPTERS REGISTRATION ICE 2022

Spreadsheet Version:	CUS-UPL-V2.5
Submitted by:	Sunilyn Hertt
Date submitted:	4/19/2022
Delegation Code:	
Corporate Team Code:	
Market Code:	
Comm Location Code:	BUSINESS
Add Relationship:	N
Type:	Employment
Bill Customer:	Employer
Ship Customer:	Employee
Update Info (Name, Email, Address, Phone):	N

Email SSO	Y
Create SSO	Y
Enterprise Customers	N

Last Name *	First Name*	Email*	Job Title	Company	ATD Member ID	Mailing Address*
Morris	Shelby	shelby.morris@okstate.edu	Training Coordinator	OSU	11028236	401 General Academic Bldg
Taylor	Alaina	alaina.taylor@truitycu.org	Lead Trainer	Truity Federal	11741018	501 S Johnstone
Gentis	Andrea	agentis@mcg-ins.com	L&D Specialist	Mid-Continent	11599881	1437 S. Boulder Ave., Ste 100
Hertt	Sunilyn	shertt@okstate.edu	Government specialist	OSU		1219 W Cades
Boggs	Kim	kimboggs63@gmail.com	Learning & Development Gateway Facilitator	OSU	11549962	87 Cedar Ridge Road

City*	State*	Zip*	Phone Number	CHip Code	VIP add on	Networking Night Add on	Meeting Product Virtual or In Person
Stillwater	OK	74078	4057444747	CH7015			In Person
Bartlesville	OK	74006	9183377635	CH7015			In Person
Tulsa	OK	74119	918-561-9310	CH7015	Yes		Virtual
Stillwater	OK	74075	918-345-0373	CH7015		YES	In Person
Broken Arrow	OK	74011	9182897138	7015	no	no	Virtual

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

Category Description	2020 Actual	2021 Actual	2022 Budget	Apr-22	Year-to-Date (YTD)	Difference (Budget - YTD)	Notes
INCOME							
ATD CHIP/Membership Fees/Award	\$ 2,208.09	\$ 2,487.82	\$ 2,500.00	\$ 910.00	\$ 1,800.00	\$ 700.00	Chapter Memberships (\$150), 1Q Chip Pymt (\$260), Award (\$500)
Meeting Fees	\$ 3,730.00	\$ 1,810.00	\$ 4,000.00	\$ 500.00	\$ 690.00	\$ 3,310.00	36 Event Registrations
Membership Dues	\$ 2,875.00	\$ 1,275.00	\$ 1,250.00	\$ 350.00	\$ 650.00	\$ 600.00	8 Chapter Member Registrations
ATD Meeting Sponsorship	\$ 250.00	\$ 250.00	\$ 1,000.00		\$ 250.00	\$ 750.00	
ATD Newsletter Sponsorship	\$ -	\$ -	\$ 200.00		\$ -	\$ 200.00	
Special Event - Training	\$ -	\$ -	\$ 3,000.00		\$ -	\$ 3,000.00	
Networking Event Sponsorship	\$ -	\$ -	\$ 300.00		\$ -	\$ 300.00	
Networking Event Fees	\$ 190.00	\$ 10.00	\$ 100.00		\$ -	\$ 100.00	
Special Event - State Conference	\$ -	\$ 6,507.01	\$ -		\$ -	\$ -	
Special Event- State Conference Sponsorships	\$ -	\$ 2,000.00	\$ -		\$ -	\$ -	
TOTAL INCOME	\$ 9,253.09	\$ 14,339.83	\$ 12,350.00	\$ 1,760.00	\$ 3,390.00	\$ 8,960.00	
EXPENSES					\$ -	\$ -	
Board Expense					\$ -	\$ -	
National ATD Dues	\$ -	\$ 179.00	\$ -		\$ -	\$ -	
Retreat	\$ -	\$ -	\$ -		\$ -	\$ -	
ATD Leader's Conference (ALC)	\$ 700.00	\$ 700.00	\$ 1,750.00		\$ -	\$ 1,750.00	
Treasurer Expense	\$ 7.50	\$ -	\$ 60.00		\$ -	\$ 60.00	
Annual Audit	\$ 1,200.00	\$ 1,260.00	\$ 1,500.00		\$ -	\$ 1,500.00	
TOTAL Board Expense	\$ 1,907.50	\$ 2,139.00	\$ 3,310.00		\$ -	\$ 3,310.00	
Communications Expense					\$ -	\$ -	
GoDaddy Domains	\$ 84.68	\$ -	\$ 169.36		\$ -	\$ 169.36	
Go Daddy Email	\$ 119.76	\$ 646.92	\$ 700.00		\$ 503.16	\$ 196.84	
Wild Apricot Web Site	\$ 1,536.00	\$ 1,536.00	\$ 1,824.00		\$ -	\$ 1,824.00	
SurveyMonkey & Virtual Meeting Subscriptions	\$ 408.00	\$ 539.95	\$ 608.00		\$ 408.00	\$ 200.00	
PO Box Subscription	\$ 92.00	\$ 118.00	\$ 118.00		\$ 156.00	\$ (38.00)	
Marketing	\$ -	\$ -	\$ -		\$ -	\$ -	
TOTAL Communications Expense	\$ 2,240.44	\$ 2,840.87	\$ 3,419.36		\$ 1,067.16	\$ 2,352.20	
Meeting Expense					\$ -	\$ -	
Annual ATD Program Certification Expense			\$ 100.00		\$ 100.00	\$ -	
Facility Charge	\$ 220.00	\$ -	\$ -		\$ -	\$ -	
Meals-Food	\$ 778.11	\$ -	\$ -		\$ -	\$ -	
ATD December Special Program	\$ 141.69	\$ 123.30	\$ 250.00		\$ -	\$ 250.00	
Recognition Items	\$ -	\$ -	\$ 600.00		\$ 46.00	\$ 554.00	
TOTAL Meeting Expense	\$ 1,139.80	\$ 123.30	\$ 950.00		\$ 146.00	\$ 804.00	
Membership Expense					\$ -	\$ -	
Name Badges	\$ 309.73	\$ -	\$ -		\$ -	\$ -	
Membership Development/Appreciation	\$ 200.00	\$ 920.82	\$ 1,000.00		\$ -	\$ 1,000.00	

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

New Member Appreciation/Recognition	\$ -	\$ -	\$ -		\$ -	\$ -	
TOTAL Membership Expense	\$ 509.73	\$ 920.82	\$ 1,000.00		\$ -	\$ 1,000.00	
	\$ -						
Misc. Expenses					\$ -	\$ -	
Online Payment Processing Expense	\$ 280.70	\$ 246.06	\$ 350.00		\$ 32.76	\$ 317.24	
Oklahoma ATD State Conference	\$ -	\$ 8,962.70	\$ 1,000.00		\$ 629.07	\$ 370.93	
Other Special Event Expense	\$ -	\$ -	\$ 1,000.00		\$ -	\$ 1,000.00	
Insurance	\$ 970.60	\$ 1,070.24	\$ 1,200.00	\$ 50.82	\$ 663.68	\$ 536.32	Monthly general liability insurance payment (\$50.82)
TOTAL Misc Expense	\$ 1,251.30	\$ 10,279.00	\$ 3,550.00	\$ 50.82	\$ 1,325.51	\$ 2,224.49	
	\$ -						
TOTAL EXPENSES	\$ 7,048.77	\$ 16,302.99	\$ 12,229.36	\$ 50.82	\$ 2,538.67	\$ 9,690.69	
	\$ -						
OVERALL TOTAL	\$ 2,204.32	\$ (1,963.16)	\$ 120.64	\$ 1,709.18	\$ 851.33	\$ (730.69)	

Prepared by Jennifer Roberson, 2022 VP
Finance on 5/4/22

**ATD Tulsa Chapter
Statement of Financial Position as of April 30, 2022**

Assets		Liabilities	
Arvest Checking Account	\$ 6,395.59	Accounts Payable	\$ -
Arvest Money Market Account	\$ 15,003.30	Taxes Payable	<u>\$ -</u>
Cash	\$ 73.30		
Accounts Receivable in Wild Apricot*	\$ 120.00	Total Liabilities	<u><u>\$ -</u></u>
(Less doubtful accounts)**	\$0.00		
		Net Assets	
		Unrestricted Net Assets	\$ 21,592.19
		Temporarily Restricted Net Assets	\$ -
		Permanently Restricted Net Assets	\$ -
Total Cash Assets	<u>\$ 21,592.19</u>	Total Net Assets	<u><u>\$ 21,592.19</u></u>
Total Assets	<u><u>\$ 21,592.19</u></u>	Total Liabilities Plus Net Assets	<u><u>\$ 21,592.19</u></u>

* Accounts Receivable: Two ATD Tulsa Associate Membership initiated but not paid and one ATD Event Registration invoiced April and payment was received in May, but has not been desposited.

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

Prepared by Jennifer Roberson, 2022 VP Finance on 5/3/22.

May 2022 Membership Report

Tuesday, May 3, 2022, 11:29am

Total Membership as of 4/30/22: 79 (+5)

PM: 52 (0)

Tulsa: 26 (+5)

Student: 2 (+1)

Student PM: 1 (0)

PM/Membership: 66% (52/79)

New Members as of 4/30/22:

Lara Borsoi, Oral Roberts, ATD Tulsa Student

Charmaine Cruise, River Spirit Casino, ATD Tulsa

Dina Fox, Dina Fox Consulting, ATD Tulsa

Debra Oiejownik, PM

Renewing Members as of 4/30/22:

12 Renewing Members

Lenzi Arnold, BOK Financial, PM

Giffene Charles-Toussaint, C2 Technologies, ATD Tulsa

Stacy Davis, Bayshore Consulting, ATD Tulsa

Julia Fletcher, BOK Financial, ATD Tulsa

Miranda Foust, Brookdale Senior Living, ATD Tulsa Student

Andrea Gentis, Mid-Continent Group, PM

Ron Heerlyn, Matrix Service Company, PM

Sunilyn Hertt, Tulsa County, PM

Linda Jenkins, Jenkins Consulting Group, PM

Kristen Saint, WeStreet Credit Union, ATD Tulsa

Lorinda Schrammel, Growth Training and Consulting, PM

Rachel Wagner, Rachel Wagner Etiquette & Protocol, ATD Tulsa

Power Members Past Due as of 4/30/22:

Greg Kittinger, 1/31/2022 - Tried to contact via email and phone. No response. Move to inactive.

Myra Fanning, 2/28/2022 - Need to contact her.

Brenda Hall, 2/28/2022 (Email disabled 9/1/2021) - Tried to contact via phone. No response. Move to inactive.

Michael Horton, 2/28/2022 - Tried to contact via email & phone. No response. Move to inactive.

Nikki Johnston, 3/11/2022 - emailed in March and april. No reply.

Sherri Goemmer, 3/31/2022 - emailed in april, no reply.

Holly Philips, 3/31/2022 - emailed in april, no reply.

Gail Herrington, 4/22/2022 - emailed in april.

Lewana Harris, 4/30/2022 - emailed & texted 5/3.

Tina Mathes, 4/30/2022 - emailed and called 5/3.

Nicholi Simmons, 4/30/2022 - emailed and called 5/3.

Lynn Thorne, 4/30/2022 - emailed and called 5/3.

Greg Kittinger - 1/31/2022, Texted in March, move to non member 4/30/2022

Rachel Wagner - 1/31/2022, Texted, Plans to renew as Tulsa member.

Moved to Non-member:

Tracie Gregory, 4/1/2022

**ATD TULSA PROFESSIONAL DEVELOPMENT PROGRAMS
REQUEST FOR PROPOSAL FORM**

1. **Name/Title/Credentials:** *(to appear in promotional/marketing materials):*
Kimberly Cofrancesco, MS Kimberly Cofrancesco, MS is a passionate speaker and self-proclaimed learning geek! She believes that training does not have to be boring and she's on a personal mission to help organizations recognize the value of creative approaches to training. Kimberly has over 15 years of experience in learning and development, with a strong interest in how eLearning and virtual training has evolved over the past decade. She is a lifelong learner, always seeking opportunities to further her own knowledge and skills, while acting as a mentor to share her wisdom with others.

Brian Lanza, M.Ed. With over 10 years of experience working in learning and development, Brian has designed and delivered training solutions for both regional and global audiences across various industries. These include telecommunications, hotel and restaurant hospitality, information technology, and financial and accounting services. Having served in a leadership capacity with his local ATD chapter as the VP of Membership and Marketing, Brian enjoys giving back to his L&D community. He is an instructional designer, speaker, and writer, and along with his co-presenter, a previous recipient of the Learning Guild's award for Best Process Solution in E-Learning. He has a passion for talent development and is consistently seeking new and improved ways to make training more interesting and impactful for his audience.

2. **Workshop Title:** *(The workshop title should fit with workshop themes outlined.)*

7 Fundamentals of Effective eLearning

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."**

Our workshop empowers learning professionals to develop talent by providing them with an easy to remember framework to ensure the elearning they design and/or develop is effective.

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

Program attendees will learn about our 7 Fundamentals for Effective E-learning. Based on the key principles utilized in our award-winning course design, they will first explore the questions to consider when determining if e-learning is indeed the correct training solution. They will learn how to capture their learner's attention at the onset of the course and then how to keep them engaged via the use of storytelling. Next, they'll be presented with strategies for storyboarding your course and how to utilize push versus pull techniques to give learners control and autonomy in their learning journey. Finally, they'll learn the importance of application and practice in e-learning and why it is

essential to “support your peeps” after completion of their training. They will leave this session with a collection of new tools to add to your e-learning design toolbox which that can be applied immediately back on the job.

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.)*

E-learning is increasingly becoming the ‘go-to’ solution for learning and development as companies look to decrease costs and reach out to an expanding, global workforce. It has also skyrocketed to the forefront of organizational needs with the challenges that have recently been presented with working in a COVID-19 world. The problem is that most of the e-learning that is out there is poorly designed, and quite honestly, boring! Common missteps in approaches and techniques have learners simply clicking ‘next’ to get to the end of the training as quickly as possible.

Addressing this dilemma is what inspired us to create “The 7 Fundamentals of Effective E-Learning.”

Based on our combined years of experience in the industry and drawing references from an award-winning compliance course, this session will present you with the key elements to include in your next e-learning module to make it more engaging, impactful, and fun!

6. List the top three (3) [ATD Capability Model](#) topic(s) your workshop addresses

Developing Personal Capability: Lifelong Learning Developing Professional Capability: Instructional Design Impacting Organizational Capability: Performance Improvement, Future Readiness

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...”

Recognize the 7 fundamental principles to utilize when designing effective e-learning.

Describe how to capture and keep your learner’s attention throughout the instructional event.

Recognize the importance of storyboarding in purposeful e-learning design.

Identify how to implement learner autonomy and decision making in your course.

Identify impactful approaches for learners to apply what they are learning.

Explain why it is necessary to support your learners upon completion of their training.

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.

Virtual delivery of 7 modules with audience interaction (chat, questions, etc. every 3-4 minutes throughout the entire presentation, with an additional 10 minutes for Q&A at the end.

9. Handout / Performance Tools:

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

We will provide a job aid handout that lists each of the 7 principles which includes a memorable summary of each principle

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.

Zoom is perfect!

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.

Brian and Kimberly have delivered this workshop to several ATD chapters, both live and virtually. Kimberly has also spoken at national learning conferences, and Brian has been published in TD Magazine. The course that we reference throughout the sessions won a DevLearn/DemoFest award through eLearning Guild.

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.

<https://youtu.be/SMoGbkH1XkE>

14. Biography: 300 words or less per speaker

To appear in workshop promotional/marketing materials

Kimberly Cofrancesco, MS Kimberly Cofrancesco, MS is a passionate speaker and self-proclaimed learning geek! She believes that training does not have to be boring and she's on a personal mission to help organizations recognize the value of creative approaches to training. Kimberly has over 15 years of experience in learning and development, with a strong interest in how eLearning and virtual training has evolved over the past decade. She is a lifelong learner, always seeking opportunities to further her own knowledge and skills, while acting as a mentor to share her wisdom with others.

Brian Lanza, M.Ed. With over 8 years of professional experience working in learning and development, he has designed training products for both regional and global audiences across various industries. These include telecommunications, hotel and restaurant hospitality, information technology, and financial and accounting services. Having served ATD-RTA previously as the Vice President of Membership and Marketing, Brian enjoys giving back to his L&D community. He is a lifelong learner with a passion for instructional design who is consistently seeking new and improved ways to make training more engaging and impactful for his audience.

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.

Rosa Espinal-Perry (rosaespinal@mail.com)

Alex Cook (vp.programs.atdrta@gmail.com)

Laura Paramoure (lparamoure@eparamus.com)

16. Professional Photo:

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

For workshop promotional/marketing materials





**ATD TULSA PROFESSIONAL DEVELOPMENT PROGRAMS
REQUEST FOR PROPOSAL FORM**

1. **Name/Title/Credentials:** *(to appear in promotional/marketing materials):*
Sardek Love

2. **Workshop Title:** *(The workshop title should fit with workshop themes outlined.)*
Facilitating Like a Pro! 3 Guranteed Ways to Create Massive Participant Engagement in Live, Virtual Training

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.”**

A lack of participant engagement is the #1 challenge training professionals experience on the job. This program equips trainers with the foundational knowledge to overcome that challenge.

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

As the leading expert in facilitation, this workshop provides a revolutionary way to ensure massive participant engagement.

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.)*

Please see attached session details and speaker bio document

6. List the top three (3) [ATD Capability Model](#) topic(s) your workshop addresses

Knowledge of facilitation methods and techniques, Knowledge of instructional methodologies (gamification), and skill in facilitating meetings and / or learning events in face-to-face and / or virtual environments

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...”

See attached session details and bio document

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.

To save time, I am skipping this question.

9. Handout / Performance Tools:

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

Participants will be granted free access to an online portal containing various training activities and the instructions for facilitating them

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.

We will provide a Zoom link for the session. Since Sardek is offering this program pro bono, he requests the chapter provide a Producer with intermediate to advanced skills serving as a Producer of zoom meetings.

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.

See attached session details and bio document

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.



Session Details

Session Title

Facilitating Like a Pro!

Session Sub-Title

3 Guaranteed Ways for Creating Massive Participant Engagement in Live Virtual Training

Session Description

When delivering live virtual training, have you ever asked a question and got confidence-crushing silence in response? Do you ever feel frustrated when attendees show up distracted, disengaged, or disinterested? Have you ever delivered training content even you would sleep through?

If you answered YES, you are not alone. After being forced to deliver 100% of all training virtually for the past 24+ months, training professionals cite keeping participants engaged as the #1 challenge they're facing.

Give us 1 hour of your time, and in return, Master Facilitator | author | and International Keynote speaker Sardek Love is going to show you how to not only engage but to absolutely WOW your live virtual training participants regardless of the topics you deliver.

After attending this fast, fun, and interactive session, you will be able to:

- Identify the ONE THING every participant wants when they attend your live virtual training
- Avoid making 2 MISTAKES that instantly cause participants to ignore you and begin multitasking
- Use an activity to have participants create their own highly desirable job aid in real time

As a bonus for attending, you'll be granted exclusive access to multiple, ridiculously engaging virtual training activities you can immediately embed in your training with little to no prep time. So, join us for this rare, one time event with Master Facilitator and ATD international top-rated speaker Sardek Love to make your training so engaging your participants won't even know they are learning.

SARDEK LOVE

INTERNATIONAL KEYNOTE SPEAKER AND PEAK PERFORMANCE EXPERT
**CREATOR OF PEAK PERFORMANCE MADE SIMPLE: THE SYSTEM FOR MAXIMIZING
TEAM OUTPUT, GROWING PROFITS, AND BEATING THE COMPETITION**



Sardek Love Bio

Sardek is the CEO of Sardek Love International and coauthor of *Speak for a Living 2nd Edition* and the upcoming new book *Presentation Essentials* (scheduled for release by McGraw Hill in October 2022). As the creator of the *Master Virtual Presenter program*, he teaches talent development professionals how to expertly use facilitation skills to deliver highly engaging training on any topic. An extremely popular international keynote speaker, training expert, and peak performance consultant, Sardek has delivered keynotes and high impact training programs in 32 countries. In 2018, he was cited by ATD as one of the top 25 global thought leaders in talent development, and in 2022 he was cited by ATD as one of the “biggest names in the industry”. As one of the top drawing speakers at the ATD International Conference for 7 years running, his session *Facilitating with Impact! 3.0* session was designated a Super Session for the 2nd consecutive year.

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- 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.

www.MasterVirtualPresenter.com or www.SardekLove.com

14. Biography: 300 words or less per speaker

To appear in workshop promotional/marketing materials

See attached session details and bio document

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.

As one of 13 “Super Session” speakers at ATD ICE 2 years running and a speaker at ATD ICE every year since 2002, Bridget Dunn, ATD’s Associate Director of Conference Programming can answer any questions about my speaking ability.

16. Professional Photo:

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

For workshop promotional/marketing materials

