atd TULSA CHAPTER
Association for Talent Development

Board Meeting Agenda

Date & Time: Monday, September 12, 2022, from 4:30 PM to 6:30 PM

Location: Virtual via Zoom

https://us06web.zoom.us/j/83393251516?pwd=S1dRSm5kYmN6WnRCTXZUOWllcUw4dz09

Meeting ID: 833 9325 1516   Passcode: 924401

1) Meeting Called to Order
   a) Board Meeting Minutes – Linda Jenkins, Past President, assigned to take minutes.
   b) Roll Call – President
   c) Confirm Quorum
   d) Guests Present
   e) Agenda for September 12, 2022, Board Meeting – Review and Approve

2) Board of Directors – President
   a) Minutes from August 9, 2022, Board Meeting – Review and Approve
   b) Bylaws and Policies Committee Update – Past President
   c) ALC is virtual- Team Rate is $800, we have 225 in credit
   d) Leader Connection Hour- Difficult Conversations- Nov 9, 2022, 02:00 PM in Eastern Time
      https://td-org.zoom.us/meeting/register/tZcrfu2rrj0uEtHFHms_xI4q3hm-9WKHv52-
   e) ATD National Advisors for Chapters (NAC) Meeting – President
      i) Jennifer attended the August 12th virtual NAC meeting at 12 PM CDT
      ii) Jennifer attended the August 23rd virtual ATD Leaders meeting at 12 PM CDT. (DEI Real Talk)
      iii) Andrea will attend the NAC meeting on October 14th at 12 PM CDT.
      iv) Identify a board member to attend the NAC meeting on December 9th at 12 PM CDT
   f) Employee Learning Week- Dec. 5-9-

3) Governance – President
   a) Elections Committee Update
   b) Board succession Planning-
      i) 2023 Board members attend- Everything You Want to Know About CARE 2023 (But Were Afraid To Ask) October 18 at 2:00 p.m. ET- https://td-org.zoom.us/meeting/register/tZEpfu-spjosEte186GFW6i45xQX9jmho6gS
      ii) Onboarding Board members- Plan for November, get with new board members to schedule dates

4) Membership – VP of Membership
   a) Monthly Membership Report - Review and Accept (attached)
   b) Membership Breakfast Event, September 9, 2022
      i) Feedback?
      ii) Pick winner of the Complimentary Registration to the ATD education program -a member who attended September 9th Member Event
   c) Annual Member Survey
   d) Power Membership Drive

5) Communications – VP of Communications
   a) LinkedIn Update
   b) September Communications Calendar

6) Financial – VP of Finance
   a) Financial Reports August 2022– Review and Accept (attached)
   b) M&M Status on Reconciliation –present recommendations

7) Programming – VP of Programming
   a) October Program meeting- Add Muscle to Your Level 1 Evaluations with Predictive Questions presented by Ken Phillips (attached)
   b) Oklahoma Statewide ATD Conference Update – President
      i) https://tdokc.org/https/tdokc.org/event-4923866
      ii) Date/Time: Wednesday, November 9, 2022, 8:00 AM - 5:00 PM
      iii) Location: Moore Norman Career Technology Center
      iv) Communications to our members

8. Old Business - None

9. New Business - None

10. Confirm Dates for Next Two Board Meetings – President

   a) October Board Meeting - Wednesday, October 5, 2022, from 4:30 PM to 6:30 PM
   b) Schedule November Board Meeting

11. Confirm Action Items

12. Adjourn Meeting

![ATD Tulsa Chapter logo - Association for Talent Development]

Board Meeting Minutes

Date & Time: Monday, September 12, 2022, from 4:30 PM to 6:30 PM

Location: Virtual via Zoom

https://us06web.zoom.us/j/83393251516?pwd=S1dRSm5kYmN6WnRCTXZUOWllcUw4dz09

Meeting ID: 833 9325 1516   Passcode: 924401

1) Meeting Called to Order by President Sunilyn Hertt at 4:34 PM
   a) Board Meeting Minutes – Linda Jenkins, Past President, volunteered to take minutes.
   b) Roll Call – President
      Members Present:
      1) Suni Hertt, President
      2) Linda Jenkins, Past President
      3) Kim Boggs, VP of Membership
      4) Jennifer Roberson, VP of Finance
      5) Walt Hansmann, VP of Programming
      Members Absent (Unexcused):
      1) Andrea Gentis, VP of Communications
   c) Confirm Quorum – 5 of 6 Members Present, Quorum Confirmed
   d) Guests Present - None
   e) Agenda for September 12, 2022, Board Meeting – Review and Approve - **Motion for approval moved, seconded, and approved.**

2) Board of Directors – President
   a) Minutes from August 9, 2022, Board Meeting – Review and Approve - **Motion for approval moved, seconded, and approved.**
   b) Bylaws and Policies Committee Update – Past President
      i) Meetings held on August 15th and August 30th. Next meeting scheduled for September 13th.
      ii) Working to have draft bylaws for review at October 5th board meeting.
   c) ALC has been changed to a virtual format. It will be held on November 3rd and 4th. Want to provide opportunity for all six (6) 2023 board members to attend. Team Rate is $800, we have $225 in credit (paid for one (1) board member to attend in-person before change to virtual). Per ATD, we may apply the $225 credit to a team registration ($800 for five (5) attendees) for ALC before October 1st.
      Action Item: Jennifer will pay for 6 members to attend ALC with 5 attending under the team rate of $800 and one attending for $200 individual rate. Change allows all board members to virtually attend within budget for one (1) person to attend in-person.
   d) Leader Connection Hour- Difficult Conversations- Nov 9, 2022, 02:00 PM in Eastern Time
      https://td-org.zoom.us/meeting/register/tZcrfu2rrj0uEtHFHms_xI4q3hm-9WKHv52- Optional for board members to attend.
   e) ATD National Advisors for Chapters (NAC) Meeting – President
      i) Jennifer attended the August 12th virtual NAC meeting at 12 PM CDT – Jennifer reported that discussion focused on member engagement, so she discussed our proposal to offer $10 QT gift card to all members who complete the survey.
      ii) Jennifer attended the August 23rd virtual ATD Leaders meeting at 12 PM CDT. (DEI Real Talk)

Action Item: Kim will attend the NAC meeting on October 14th at 12 PM CDT.

Action Item: Jennifer will attend the NAC meeting on December 9th at 12 PM CDT

f) Employee Learning Week - Dec. 5-9 – Current activity is Annual Trainer Throwdown scheduled for December 9th

Action Item: Suni will extend an invitation to COC-ATD Chapter members to attend and participate in the Trainer Throwdown on December 9th

3) Governance – President

a) Elections Committee Update –

Elections Committee met on September 1st. The following members have been nominated for board positions:

i)   Kim Boggs, President-Elect for 2022 (to serve as President in 2023)

ii) Andrew Engelbrecht, President-Elect for 2023 (to serve as President in 2024)

iii) Scott Dixon for Vice President of Accommodations

iv) Cecilia Martin-Smith for Vice President of Communications

v)   Jennifer Roberson for Vice President of Finance

b) Board succession Planning -

i)   *Action Item:* Suni will notify and encourage 2023 Board members to attend- Everything You Want to Know About CARE 2023 (But Were Afraid To Ask) October 18 at 2:00 p.m. ET- https://td-org.zoom.us/meeting/register/tZEpfu-spjosEte186GFW6i45xQX9jmho6gS

ii) *Action Item:* Kim will coordinate onboarding for 2023 Board members. Onboarding will include inviting new 2023 board to attend remaining 2022 board meetings and training from retiring board members in November and December 2022.

4) Membership – VP of Membership

a) Monthly Membership Report (attached) - Review and Accept - **Motion for acceptance moved, seconded, and approved.**

(1) Members: 76 (-1)

(2) Power Members: 43 (-1)

(3) Tulsa ONLY Members: 31(+3)

(4) Student Members: 2 (0)

(5) %PM=56.5% (-1/2%)

b) Membership Breakfast Event at Neighborhood Jam on September 9, 2022

i)   Feedback – Attended by 9 of 14 registered members. Positive engagement from attendees and good food and service from Neighborhood Jam.

ii) Pick winner of the Complimentary Registration to the ATD education program from a member who attended September 9th Member Event – Heather Quintero won the Complimentary Registration to the ATD Education Program

Action Item: Kim will contact Heather Quintero to let her know she has won the Complimentary Registration to the ATD Education Program and steps for redeeming it.

c) Annual Member Survey – Distributed via email on September 10, 2022. Due on September 23, 2022. Email reminders scheduled for September 16th and September 21st.

d) Power Membership Drive – Did not discuss.

Action Item: Board members will discuss ideas for membership drive during October meeting. Want it to focus on recruiting ATD members in northeast Oklahoma.

5) Communications – VP of Communications – Andrea was not at the meeting and no written report submitted.
   a) LinkedIn Update
   b) September Communications Calendar
      Action Item: Discussed request to Andrea have a learning session for other board members to learn about creating flyers in Canva.

6) Financial – VP of Finance
   a) Financial Reports August 2022– Review and Accept (attached) **Motion for acceptance moved, seconded, and approved.**
      i) Per Statement of Financial Position as of 8/31/22: Total Liabilities Plus Net Assets = $22,478.85
      ii) Per Income and Expense Report as of 8/31/22:

      August Income = $463.33
      August Expense = $222.94
      August Overall Total = $240.39
   b) M&M Status on Compilation – present recommendations – Jennifer contacted several firms and did not identify one to complete the Compilation. Since M&M has agreed to complete the Compilation at the 2021 rate ($1,260, the board agreed with her recommendation to have it completed by M&M.
      Action Item: Jennifer will contact M&M to have our 2021 Compilation completed for $1,260.

7) Programming – VP of Programming
   a) August 12th Program Meeting – Hybrid Teams: What You and Your Leaders Need to Know by Chris Coladonato Participant Survey Results (attached) - Review and Discuss - Completed
   b) September 16th Program Meeting - Translating your Learning & Talent Management Skills to Change Management Roles and Projects Presented by Katie McLaughlin
      i) Board members attending: Linda and Suni
      ii) *Action Items for September Program Meeting*:
         (1) Suni will serve as meeting host including serving as producer for presenter and recording meeting. Will provide the recording to Walt for posting.
         (2) Linda will check in participants.
         (3) Walt will distribute the meeting evaluation survey on Monday, September 18, 2022.
   c) October Program Meeting Proposal - Add Muscle to Your Level 1 Evaluations with Predictive Questions presented by Ken Phillips (attached) **–** Review and Approve - **Motion for approval moved, seconded, and approved.**
   d) Discussed Date Options for 2023 Sententia Gamification 1-Day In-Person Workshop – After discussion, selected Tuesday, March 7, 2023.
      Action Item: Walt will follow up with Sententia and identify location options. Anticipate having a formal proposal for review and approval at the October 2022 board meeting.
   e) Oklahoma Statewide ATD Conference Update – President

i) https://tdokc.org/https/tdokc.org/event-4923866
ii) Date/Time: Wednesday, November 9, 2022, 8:00 AM - 5:00 PM
iii) Location: Moore Norman Career Technology Center
Action Item: Suni will contact Madi Dyer to discuss statewide conference marketing, alignment of conference marketing with ATD standards, and annual $1,000 sponsorship. Will consider sponsorship if marketing is adjusted to be in alignment with ATD standards, ATD Tulsa is included appropriately in marketing materials and efforts e.g., conference code for ATD Tulsa member registration and customized solicitations.

8. Old Business - None

9. New Business - None

10. Confirm Dates for Next Two Board Meetings – President

   a) October Board Meeting - Wednesday, October 5, 2022, from 4:30 PM to 6:30 PM
   b) Schedule November Board Meeting – November 8, 2022, from 4:30 PM to 6:30 PM
   Action Item: Suni will distribute the Zoom meeting link for the October and November board meetings.

11. Confirm Action Items

   1. *Action Item*: Jennifer will pay for 6 members to attend ALC with 5 attending under the team rate of $800 and one attending for $200 individual rate. Change allows all board members to virtually attend within budget for one (1) person to attend in-person.
   2. *Action Item*: Kim will attend the NAC meeting on October 14th at 12 PM CDT.
   3. *Action Item*: Jennifer will attend the NAC meeting on December 9th at 12 PM CDT
   4. *Action Item*: Suni will extend an invitation to COC-ATD Chapter members to attend and participate in the Trainer Throwdown on December 9th
   5. *Action Item:* Suni will notify and encourage 2023 Board members to attend- Everything You Want to Know About CARE 2023 (But Were Afraid To Ask) October 18 at 2:00 p.m. ET- https://td-org.zoom.us/meeting/register/tZEpfu-spjosEte186GFW6i45xQX9jmho6gS
   6. *Action Item:* Kim will coordinate onboarding for 2023 Board members. Onboarding will include inviting new 2023 board to attend remaining 2022 board meetings and training from retiring board members in November and December 2022.
   7. *Action Item*: Kim will contact Heather Quintero to let her know she has won the Complimentary Registration to the ATD Education Program and steps for redeeming it.
   8. *Action Item*: Kim will contact Heather Quintero to let her know she has won the Complimentary Registration to the ATD Education Program and steps for redeeming it.
   9. *Action Item*: Kim will contact Heather Quintero to let her know she has won the Complimentary Registration to the ATD Education Program and steps for redeeming it.
   10. *Action Item*: Jennifer will contact M&M to have our 2021 Compilation completed for $1,260.
   11. *Action Items for September Program Meeting*:
       a. Suni will serve as meeting host including serving as producer for presenter and recording meeting. Will provide the recording to Walt for posting.
       b. Linda will check in participants.
       c. Walt will distribute the meeting evaluation survey on Monday, September 18, 2022.

12. *Action Item*: Walt will follow up with Sententia and identify location options. Anticipate having a formal proposal for review and approval at the October 2022 board meeting.

13. *Action Item:* Suni will contact Madi Dyer to discuss statewide conference marketing, alignment of conference marketing with ATD standards, and annual $1,000 sponsorship. Will consider sponsorship if marketing is adjusted to be in alignment with ATD standards, ATD Tulsa is included appropriately in marketing materials and efforts e.g., conference code for ATD Tulsa member registration and customized solicitations.

12. Adjourn Meeting: Meeting adjourned at 6:30 PM

Minutes Prepared and Submitted by Linda Jenkins, Past President on September 20, 2022

ATD Tulsa Chapter
Statement of Financial Position as of August 31, 2022

Assets			**Liabilities**		
Arvest Checking Account	$	7,400.66		Accounts Payable	$ -
Arvest Money Market Account	$	15,004.89			
Cash	$	73.30		Taxes Payable	$ -
Accounts Receivable in Wild Apricot*	$	-	**Total Liabilities**		$ -
(Less doubtful accounts)**		$0.00			
			Net Assets	Unrestricted Net Assets	$ 22,478.85
				Temporarily Restricted Net Assets	$ -
				Permanently Restricted Net Assets	$ -
Total Cash Assets	$	22,478.85	**Total Net Assets**		$ 22,478.85
Total Assets	$	22,478.85	**Total Liabilities Plus Net Assets**		$ 22,478.85

Prepared by Jennifer Roberson, 2022 VP Finance on 9/2/22

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

Category Description	2020 Actual	2021 Actual	2022 Budget	Aug-22	Year-to-Date (YTD)	Difference (Budget - YTD)	Notes
INCOME							
ATD ChIP/Membership Fees/Award	$ 2,208.09	$ 2,487.82	$ 2,500.00	$ 83.33	$ 2,661.29	$ (161.29)	ATD Aug 2022 Chapter Memberships - Two memberships
Meeting Fees	$ 3,730.00	$ 1,810.00	$ 4,000.00	$ 280.00	$ 2,610.00	$ 1,390.00	15 Event Registrations (13 member rate; 1 COC member rate; and 1 guest registration add-ons; 6 OU registrations from 8/31 AR Report).
Membership Dues	$ 2,875.00	$ 1,275.00	$ 1,250.00	$ 100.00	$ 1,500.00	$ (250.00)	2 Chapter Memberships
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	$ 463.33	$ 7,021.29	$ 5,328.71	
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	$ 143.76	$ 646.92	$ 53.08	Renewal admin@tdtulsa.org and finance@tdtulsa.org for one year.
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	$ -	$ 539.95	$ 68.05	
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	$ 143.76	$ 3,166.87	$ 252.49	
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 - August 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	$ 28.36	$ 178.50	$ 171.50	Monthly AffiniPay Fees
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	$ 866.96	$ 333.04	Monthly general liability insurance payment ($50.82)
TOTAL Misc Expense	**$ 1,251.30**	**$ 10,279.00**	**$ 3,550.00**	**$ 79.18**	**$ 1,674.53**	**$ 1,875.47**	
	$ -						
TOTAL EXPENSES	**$ 7,048.77**	**$ 16,302.99**	**$ 12,229.36**	**$ 222.94**	**$ 4,987.40**	**$ 7,241.96**	
	$ -						
OVERALL TOTAL	**$ 2,204.32**	**$ (1,963.16)**	**$ 120.64**	**$ 240.39**	**$ 2,033.89**		

Prepared by Jennifer Roberson, 2022 VP
Finance on 9/2/22

Membership Report for September 2022

Results as of 8/31/2022

Members: 76 (-1)
Power Members: 43 (-1)
     PM Overdue: 2
         Kristen Cox-July 31, 2022
         Milton Knopp-June 30, 2022

Tulsa ONLY Members: 31(+3)

Student Members: 2 (0)

Student PM: 0 (0)

%PM=56.5% (-1/2%)

New Members as of 8/31/2022:
Dr. Fatimoh Harris, Excel Professional Services
Terri Ley, Labor Relations Institute, Inc.

Renewing Members as of 8/31/2022:
None

ATD TULSA PROFESSIONAL DEVELOPMENT PROGRAMS
SPEAKER AGREEMENT

Speaker / Presenter Information

Primary Presenter Name	Ken Phillips
Co-Presenter Name (if any)	
Workshop Title	Add Muscle to Your Level 1 Evaluations with Predictive Questions
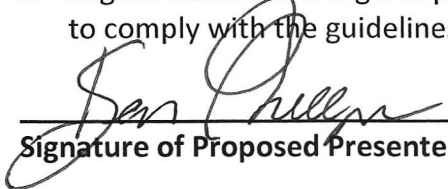
Please complete the below based on the primary presenter.

Phone	Primary#: (847) 528-3456	Co-presenter#:
Email Address	ken@phillipsassociates.com	
Title	CEO	
Company or Organization	Phillips Associates	
Mailing Address	34137 N Wooded Glen Dr	
City, State, Zip	Grayslake, IL 60030	

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.

_____   ___09/09/2022___
Signature of Proposed Presenter   Date

_____   _____
Signature of Proposed Co-Presenter   Date

ATD TULSA PROFESSIONAL DEVELOPMENT PROGRAMS
REQUEST FOR PROPOSAL FORM

1. **Name/Title/Credentials:** (*to appear in promotional/marketing materials*):
   Ken Phillips, CEO Phillips Associates, CPTD

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

   Add Muscle to Your Level 1 Evaluations with Predictive Questions

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."**

   This program provides L&D professionals with guidelines for creating three predictive metrics to include in their Level 1 evaluations that produce data viewed as highly valuable by both L&D professionals and business executives.

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

   Most L&D professionals use Level 1 evaluations in their work. However, few find the data they collect with their Level 1s highly valued. The same is true for the business executives L&D supports. They don't see much value in Level 1 evaluation data. Incorporating predictive questions in a Level 1 evaluation changes the perceived value ot the data collected from little or no value to high value.

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.)*

   Have you ever wondered if conducting Level 1 evaluations are worth the effort? Or if you should stop using them altogether? If you've had these thoughts, you're not alone. According to a 2019 ATD research study, 83% of organizations evaluate some learning programs at Level 1. Yet, only 35% view the data they collect as having either high or very high value.

   So, what can you do to start getting more valuable results from your Level 1 evaluations? The answer is start by including predictive questions in your Level 1s. Predictive questions forecast the results a learning program is likely to achieve. They begin to answer the question business executives and L&D professionals both want answered: "Is this program delivering value?" These predictions aren't proof that specific outcomes are inevitable but rather a forecast that certain results are likely.

   In this highly informative, thought-provoking session, participants will learn how to create three predictive measures: a Level 2 learniing gain score, a Level 3 training transfer likelihood score, and a Level 4 improved business results likelihood score.

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

   Evaluating Impact, Data & Analytics, and Consulting & Business Partnering

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…"

   After participating in this workshop, participants will be able to use facts from a recent ATD research study to benchmark an organization's use of Level 1 evaluations.

   After participating in this workshop, participants will be able to create predictive questions to incluse in a Level 1 evaluation that forecast participant learning (Level 2), training transfer (Level 3), and likely improved business results (Level 4).

   After participating in this workshop, participants will be able to calculate three predictive metrics: a learning gain score, a training transfer likelihood score, and an improved business results likelihood score based on the data they collect with their predictive questions.

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.

   Level 1 evaluation facts from a 2019 ATD research study (Presentation) – 10 minutes

   Introduction to predictive questions – what they are and what they aren't (Presentation) – 5 minutes

   Predictive Metric #1: calculating a Level 2 learning gain score (Demonstration with Q&A) – 15 minutes

   Predictive Metric #2: calculating a Level 3 training transfer likelihood score (Demonstration with Q&A) – 20 minutes

   Predictive Metric #3: calculating a Level 4 improved business results likelihood score (Demonstration with Q&A – 15 minutes

9. **Handout / Performance Tools:**

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

   Participants will receive a copy of the November 2021 TD magazine article I wrote titled "Predictions and Probabilities in Training Evaluation." It's the source for the presentation content.

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.

The chapter provided Zoom platform

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.

I have presented at the ATD International Conference & Expo since 2008 on the measurement and evaluation of training topics. I've also presented at the Annual Training Conference & Expo since 2013 on measurement and evaluation of training topics. Further, I've presented at four global ATD conferences and dozens of local ATD chpaters over the past ten years. As a pilot pioneer, I also earned the CPLP (now CPTD) in 2006 and have recertified five times, most recently in 2021.

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.

I delivered this presentation as a webinar for Training Magazine Network on June 9, 2022; a recording is available on their website.

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

To appear in workshop promotional/marketing materials

Ken Phillips delivers all programs and workshops in his signature style: professional, engaging, and approachable.

Ken is the CEO of Phillips Associates and the creator of the Predictive Learning Analytics™ (PLA) learning evaluation methodology. He has more than 30 years of experience designing learning assessments and has authored over a dozen published learning instruments. Ken regularly speaks to Association for Talent Developmnet (ATD) groups, university classes, and corporate L&D groups. Since 2008, he has presented at the ATD International Conference and since 2013 at the Annual Training Conference and Expo on measurement and evaluation of learning topics. He is also a regular spearker at the ATD CORE4 Conferences and has presented at four ATD Global Conferences.

Before pursuing a Ph.D. in the combined organizational behavior and educational administration fields at Northwestern University, Ken held management positions with two colleges and two national corporations. He has also written articles that have appeared in TD magazine, Training Industry Magazine, and Training Today magazine. Ken also is contributing author to five books in the L&D field and the author of the recently published ATD TD at Work publication titled Evaluating Learning with Predictive Learning Analytics.

As a pilot pioneer, Ken earned the Certified Professional in Learning and Performance (CPLP, now CPTD) credential from ATD in 2006 and has recertified five times, most recently in 2021.

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.

I've previously presented at the ATD Tulsa Chapter on two different occasions. The first was on February 19, 2021, and the topic was "Create Level 2 Quizzes and Tests That Actually Measure Something." The second was on May 20, 2022, and the subject was "Level 3 Evaluations Made Simple, Credible, and Actionable."

References:

Sardek Love, phone: 540-520-5733; Email: splove@ictscorp.com

Patti Phillips, phone: 205-678-8101; Email: patti@roiinstitute.net

Christie Ward, phone: 720-935-3530; Email: christie@christieward.com

16. **Professional Photo:**

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

For workshop promotional/marketing materials