ATD TULSA CHAPTER
Association for
Talent Development

Board Meeting MINUTES

Date & Time: Thursday, **May 6, 2021** from 4:00 PM to 6:00 PM
Location: Virtual via Zoom

1. Meeting called to order by President Linda Jenkins at 4:09 p.m.
   a. Board Meeting Minutes taken by VP of Administration – Rachel Wagner
   b. Roll Call and check in– VP of Admin., Rachel Wagner
      i. Attendees: Linda Jenkins, President; Suni Hertt, President-elect; Kim Boggs, VP Membership; Walt Hansmann, VP Programming; Lewana Harris, Past-President; Rachel Wagner, VP Administration
      ii. Quorum confirmed – (100% of board members present)
      iii. No guests
   c. Agenda for May 6, 2021 Board Meeting – motion for approval moved, seconded, and approved.

2. Board of Directors – President – Linda Jenkins

   a. Minutes from April 8, 2021 Board Meeting – motion for approval moved, seconded, and approved.
      i. **Action item**: Approved March Board Meeting Minutes need to be posted.
   b. Bylaws & Policies Committee Meeting – Rachel, VP of Administration, will poll committee members to schedule a meeting in May via Zoom.
   c. NAC Meeting – President-Elect
      1) April NAC participation report – Kim and Linda attended; (Topic: chapter communications options)
      2) **Action Item**: Suni will attend May meeting on May 18, 2021 @ 1 PM
      3) No one identified to attend June NAC meeting on June 15, 2021 @ 1 PM
      4) Dates for virtual ALC 2021 – Wednesday, November 3 (half-day), Thursday, November 4 (full-day) and Friday, November 5 (full-day)
         i. Put dates on calendar if planning to be on the 2021-2022 Board

3. Governance – President – Linda Jenkins

   a. Airtable – Linda completed updates through 4/30/21 – All board members encouraged to update as projects completed.
   b. Draft of 2020 Annual Report due on January 31, 2021 - Past-President Lewana shared the Power Point report with final edits from Walt and Linda.
      i. Motion for approval moved, seconded and approved 2020 Annual Report.
      ii. **Action item**: Rachel to post PDF copy to website
      iii. **Action item**: Announce in newsletter that it's posted

4. Financial – President – Linda Jenkins

   a. Financial Reports as of April 30, 2021 – Motion to accept report. Moved, seconded, approved.

      i.   Per Statement of Financial Position, we have $23,376.40 in our Arvest checking account.

      ii.   Per Income and Expense Report:

         Total April 2021 Income = $1,315.00 *
         <u>Total April 2021 Expense = $61.82 (no accounts receivables)</u>
         Overall April 2021 Total = $1,253.18

      iii.   *Quite a bit of income this month from memberships and renewals

b. Linda request Board authorization to contact M&M Consulting Partners PLLC to request proposal to prepare ATD Tulsa 2020 Compilation Report (Can use same accounting firm 3 years in a row; this is 3rd year with M&M.) – Motion made, seconded, and approved.

c. Request to setup Teams Group on ATD Tulsa Office 365 account to facilitate 2021 ATD Oklahoma Statewide Planning Committee communications
      i.   Would be set up to create a group for committee under our ATD security with restricted access.
      ii.   No additional fee to GoDaddy to add Teams to our Microsoft 365.
      iii.   Motion made to authorize Linda to proceed with this, seconded and approved.
      iv.   **Action item:** Linda will clarify logistics of how to implement Teams

d. Walt received TechSoup application approval as a non-profit affiliate of ATD as of 5/4/21. As part of application process, he had to obtain a current copy of our IRS Exception Declaration (Set up as ASTD dba ATD). TechSoup supports nonprofits, charities, and libraries by providing access to donations and discounts on software, hardware, and services from major brands.
      i.   **Action item**: Walt will work on next steps of implementation to determine which software we should purchase in addition to establishing an annual Zoom account. He will poll board members to identify a date/time to review TechSoup options.
      ii.   **Action item**: Walt will create a PDF of TechSoup registration document and put it in our document files stored in Wild Apricot.

5. Membership – VP of Membership – Kim Boggs

   a. Monthly Membership Report – Kim updated as of April 30, 2021

   Total Membership as of April 30, 2021: 84 (+ 4 from last month)

- PM: 54 (+1)
- Tulsa: 25 (+2)
- Student: 2 (+2)
- Student PM: 1 (no change)
- PM/Membership: 65% (-2.5%)

      i.   Motion to accept membership report – moved, seconded, passed.
      ii.   **Action items**:

- Kim will contact past due PM's (excluding Tanisha Guidry) and will contact Nicoli Simmons re: changing chapters or renewing and
- Walt will contact Vickie Corraro regarding her pending renewal
- Kim will give Lewana contact information so she can contact Tanisha Guidry, ONE Gas regarding her pending renewal
- Walt and Kim to give updated member info to Linda so she will have correct info for newsletter

Meeting break at 5:00 p.m.; resumed at 5:09 p.m.

    b. Plans for Membership Meeting on May 25, 2021 from 5:30 PM to 6:30 PM – Lessons Learned from Zoom
- i. Board members Kim, Lewana and Linda registered to attend; Walt and Suni not sure they can attend; Rachel will be on vacation.
- ii. Per Walt, May program speaker, Kamara Mayberry has conflict (rescheduled for Sept.) Discussion and decision to move this "Zoom tips" meeting to Friday, May 21 as the May program meeting. Free to members; $10 for guests.
- iii. Program topics to include: breakout rooms, annotation tools, waiting rooms
- iv. **Action item:** Linda, Kim and Walt will work on details of this meeting.
- v. Marketing strategy – Zoom link needs to be resent
- vi. **Action item:** Linda will set up Zoom meeting link for it.

6. Programming – VP of Programming – Walt Hansmann
    a. Good survey results from April 23rd Program Meeting – Results Through Relationship Intelligence with Strengths Finder 2.0 - Survey Report from 7 respondents.
    b. Plans for Future Program Meetings
- May program presenter, Kamara Mayberry has conflict with May meeting. Moved her program to September meeting.
- Has two potential June programs lined up. One is with Halelly Azulay and Elaine Biech re: a program "Going Solo as a Consultant: Realities and Rewards of Consulting."
- **Action item:** Walt will get RFPs and Speaker Agreements to both speaker groups.
- June 18 meeting program will be Barbara Ingrassia on copyright law.
- **Action item:** Walt will send survey questions to registrants that Barbara will send him so she can better customize her session.

    c. Plans for Statewide Conference – President-Elect – Suni Hertt
- i. Takeaways from Member Planning Committee Meeting on April 27, 2021
  - Topics of most interest - narrowed to Accessibility and Equity
  - Members are following up on potential recommended speakers and workshop presenters.
  - Goal to have keynote speaker by 5/28 – want speaker who can share tangible skills and techniques to implement in our training
  - Have hashtag #ATDOK21

   ii. Next Steps

      Action item: Suni will send email re: Next Committee Planning Meeting scheduled for Tuesday, May 11, 2021 from 5 PM to 6:30 PM CDT (Focus of meeting: to narrow list of potential keynote speakers and workshop speakers).

8. Communications
    a. Communications Plan for 2021
        1. Build social media following on with posts four to five times per week – Now have 108 followers
    b. Communications Scheduled for May
        1. 2021 Board Member Communications
           Action item: Rachel will post 2020 Annual Report on Wild Apricot

        2. May Program Meeting Announcements and Invitations – Communications to include update re: moving monthly member meeting to May 21 (from May 25)
        3. Hold on Newsletter and communications until May events are firmed up (including moving meeting from May 25 to May 21)
        4. Newsletter Content Suggestions
            - Continue to include opportunity to have accomplishments highlighted
            - Requests for members to participate in Conference planning
            - How to participate in winning the free ATD course

           Action item: Walt and Linda – send update on June events after updated May events communications are sent

9. Old Business - none

10. New Business

    - Check with OSU-Tulsa for when they will allow in-person meetings again as this relates to programming for January and February 2022. Perhaps do hybrid event.
    - **Action item:** Add to June Board meeting for discussion: constraints re: in-person meetings, serving food vs not serving food at monthly meetings, plan meetings for morning or afternoon when food not needed for in-person meeting.

11. Confirm Action Items
      Action item: Approved March Board Meeting Minutes need to be posted.

      Action Item: Suni will attend May NAC meeting on May 18, 2021 @ 1 PM

Action item: Linda will clarify logistics of how to implement Teams in Office 365

Action item: Walt will work on next steps of implementation to determine which software we should purchase in addition to establishing an annual Zoom account. He will poll board members to identify a date/time to review TechSoup options.

Action item: Walt will create a PDF of TechSoup registration document and put it in our document files stored in Wild Apricot.

Action item: Rachel to post PDF copy of 2020 Annual Report to website

Action item: Announce in newsletter that 2020 Annual Report is posted

Action items: Membership

- Kim will contact past due PM's (excluding Tanisha Guidry) and will contact Nicoli Simmons re: changing chapters or renewing and
- Walt will contact Vickie Corraro regarding her pending renewal
- Kim will give Lewana contact information so she can contact Tanisha Guidry, ONE Gas regarding her pending renewal
- Walt and Kim to give updated member info to Linda so she will have correct info for newsletter

Action item: Linda, Kim and Walt will work on details of May 21 Zoom tips meeting.

Action item: Linda will set up Zoom meeting link for May 21 Zoom tips meeting.

Action item: Walt will get RFPs and Speaker Agreements to June speaker groups.

Action item: Walt will do survey questions to registrants that Barbara Ingrassia will send him so she can better customize her session.

Action item: Suni will send email re: Next Committee Planning Meeting (State Conference) scheduled for Tuesday, May 11, 2021 from 5 PM to 6:30 PM CDT (Focus of meeting: to narrow list of potential keynote speakers and workshop speakers.)

Action item: Rachel will post 2020 Annual Report on Wild Apricot

Action item: Walt and Linda – send update on June events after updated May events communications are sent.

Action item: Approved March Board Meeting Minutes need to be posted.

Action item: Add to June Board meeting for discussion: constraints re: in-person meetings, serving food vs not serving food at monthly meetings, plan meetings for morning or afternoon when food not needed for in-person meeting.

12. Confirm Dates for Next Two Board Meetings

a. Date for June Meeting – Monday, June 7th from 4 PM to 6 PM
b. July Board Meeting – July 6th from 4 PM to 6 PM

13. Meeting adjourned 6:05 p.m.

Board Meeting Agenda

Date & Time: Monday, June 7, 2021 from 4:00 PM to 6:00 PM
Location: Virtual via Zoom
https://us02web.zoom.us/j/7496535431?pwd=R0hrSktvcHpxVVE5UUZNcm1XQnJ6dz09
Meeting ID: 749 653 5431   Passcode: 6P8XST

1. Call Meeting to Order - President
    a. Board Meeting Minutes will be taken by VP of Administration
    b. Roll Call – 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 June 7, 2021 Board Meeting – Review and Approve

2. Board of Directors – President
    a. Minutes from May 6, 2021 Board Meeting – Review and Approve – VP of Administration (attached)
        i. Approved March and April Board Meeting Minutes need to be posted on the ATD Tulsa website.
        ii. Approved 2020 Annual Report needs to be posted on the ATD Tulsa website.
    b. Report and Action Items from Bylaws & Policies Committee Meeting held on May 19, 2021 – VP of Administration (attached meeting minutes and two handouts)
        i. Proposed bylaws changes for board approval to submit to the membership for approval
            1) To strike from the Bylaws the word 'physically' and 'in person' to just say 'meet' in all amendments 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
        ii. Recommendation to adopt proposed Banking Policy
        iii. Recommend we transfer $15,000 from our Arvest Business Checking Account into an Arvest Business Money Market Account.
    c. Appoint Elections Committee Members – President
        i. SECTION 6.2 ELECTIONS COMMITTEE - There shall be an Elections Committee of five (5) Individual Members who shall be appointed by the President and confirmed by a majority of the Board of Directors from a list of nominees submitted by the Board of Directors. A person to be appointed to the Elections Committee must have attended no less than four (4) monthly meetings in the preceding twelve (12) months prior to nomination to the Elections Committee. The President shall appoint a chair and secretary of the committee from its membership. All vacancies shall be filled in the same manner as prescribed for appointment.

Current ATD Tulsa Members That Meet The 4 Monthly Meetings Criteria & Have Not Resigned From The Board In The Last Two Years

# Program Mtgs	First Name	Last Name	Organization	Membership level	Member since
4	Gary	Cathey	Tulsa City-County Library	Power Member	December 02, 2020
5	Myra	Fanning	John Zink Institute/John Zink Co LLC	Power Member	May 29, 2010
9	Andrea	Gentis	Mid-Continent Group	Power Member	May 01, 2020
4	Jennifer	Roberson	Stinnett & Associates	Power Member	January 27, 2021
5	Alaina	Taylor	Truity Credit Union	Power Member	October 21, 2020
5	Chantel	Gray	Truity Credit Union	Associate Member	February 26, 2014
6	Bob	Mansur	Credit Employee Performance Solutions	Associate Member	September 02, 2015

    d. NAC Meeting – President-Elect
       1) May NAC participation report – Linda, Suni & Kim attended
       2) Identify at least one member to attend June meeting on Governance on June15, 2021 @
          1 PM – Since the topic is governance, Linda will be attending and contributing materials
          for the discussion
       3) Identify at least one member to attend July meeting on July 20, 2021 @ 1 PM
3. Governance – President
    a. Airtable – Linda and Suni completed updates through 5/31/21 – All board members
       encouraged to update as projects completed
    b. Contact OSU-Tulsa to discuss room scheduling options for remainder of 2021 and 2022 –
       Dates/Times options for BS Roberts Room and BOK Room
          i. Need to consider OSU-Tulsa policies
         ii. Need to know ATD recommendations
        iii. Need to consider catering/serving constraints
         iv. Need to consider masking/social distancing/vaccination
          v. Need to consider hybrid options
         vi. Need to consider Membership Needs Assessment – how will subject be addressed in
             annual membership survey?
4. Financial - President
    a. Financial Reports as of May 31, 2021 – Review and Accept (attached)
          i. Per Statement of Financial Position, we have total assets of $21,421.76 including
             $21,348.46 in our Arvest checking account as of May 31, 2021.
         ii. Per Income and Expense Report:

             Total May 2021 Income = $216.67
             Total May 2021 Expense = $2,244.61
             Overall May 2021 Total =   ($2,027.94)
    b. Per board authorization contacted M&M Consulting Partners PLLC to request proposal to
       prepare ATD Tulsa 2020 Compilation Report. Received proposal. Circulated proposal for
       review and approval. Received approval. Signed and received signed copy of proposal. Per
       proposal, paid 1-half of total cost. Waiting for document request from M&M.

    c. Will work to get Teams Group setup on ATD Tulsa Office 365 account to facilitate 2021 ATD Oklahoma Statewide Planning Committee communications by June 15, 2021

    d. Action Needed to Purchase ATD Tulsa Zoom account via TechSoup? Options to consider other TechSoup purchases? - VP of Programming

5. Membership – VP of Membership

    a. Monthly Membership Report - Review and Accept (attached)

          Total Membership as of 5/31/21: 81 (-1)
          PM: 54 (No change) (7 Past due)
          Tulsa: 24 (-1)
          Student: 2 (No change)
          Student PM: 1 (no change)
          PM/Membership: 66% (+1%)

    b. Plans for Membership Meeting on Tuesday, June 29th from 3:30 PM to 4:30 PM – The Value of ATD Membership with Brandon Grubesky, Director, Membership, Association for Talent Development (ATD)

        i. Kim registered to attend – other board members planning to attend?

        ii. Program Logistics

        iii. Marketing strategy

    c. July Membership Event Ideas?

    d. New Member Orientation Process – What's being covered and how is it being received?

    e. Plans for Annual Member Survey?

    f. Membership outreach to promote Chapter engagement and social media followers?

        i. Member accomplishments to highlight?

        ii. New and Renewing Members to highlight?

    g. Plans to distribute FREE online ATD course from sending ATD Membership sale message to members being promoted/announced in newsletters

6. Programming – VP of Programming

    a. May 21, 2021 Program Meeting – Tips & Tricks for Training in Zoom

        i. Review and discuss event experience and opportunities for improvement – Survey Report (attached)

        ii. Update on plans for distributing session video for attendees?

    b. Plans for Future Program Meetings

        i. Team attending #ATD21 ICE – Need to let them know about expectation/opportunity to participate in November Program Meeting – President-Elect

    c. Plans for June 18 Program Meeting - Content & Logistics:

        i. Topic & Presenter - Copyright Law for Learning Professionals: Shedding Some Light, Presented by Barbara C. Ingrassia, MLS, AHIP, CCM, DCL

        ii. Accommodations – Virtual via Zoom

        iii. Workshop Program – 12:00 PM to 1:00 PM with Welcome & Announcements from 11:45 AM to 12 PM and Networking from 1 PM to 1:30 PM CDT

        iv.   Board Member Attendance & Participation – Walt, Kim, and Linda currently registered

        v.   Pitch to Attend Future Program Meetings and Ideas for Future Meetings

        vi.   Power Membership Promotional Activities – Value of ATD Membership Event on June 29th and ATD21 ICE Team

        vii.   Post Meting Evaluation Online Distribution by Monday, June 21, 2021

   d.   Plans for Statewide Conference – President-Elect

        i.   Date Selected – Thursday, October 28, 2021

        ii.   Keynote Speaker Pending Written Confirmation – Dr. Maureen Orey, Workplace Learning and Performance Group

        iii.   Title & Theme - Accessibility by Design: Integrating Accessibility Principles into Your Talent Development Strategies

        iv.   Next Steps

            a)Next Committee Planning Meeting scheduled for Tuesday, June 15, 2021 from 5 PM to 6:30 PM CDT

8. Communications –

   a.   Communications Plan for 2021

        1.   Build social media following on with posts four to five times per week – Now have 111 followers

   b.   Communications Scheduled for June

        1.   2021 Board Member Communications

            a)Elections

            b)   2020 Annual Report – Needs to be posted and distributed to members

            c)Process/Code for attending COC-ATD events at Chapter Member rate

        2.   June Program Meeting Announcements and Invitations

        3.   June Membership Meeting Announcement and Invitations

        4.   June Newsletter Distributed on June 1st

        5.   Statewide Conference Communications

   c.   Communications Needs & Opportunities

9. Old Business

10. New Business

11. Confirm Action Items

12. Confirm Dates for Next Two Board Meetings

   a.   July Board Meeting – **July 6th**

   b.   Date Options for August Board Meeting – Tuesday, August 3rd, Wednesday, August 4th or Thursday, August 5th

13. Adjourn Meeting

ATD Bylaws/Policy Committee

Wednesday, May 19, 2021, 5:00- 6:00 p.m. via Zoom (ended 6:25 p.m.)

Meeting Agenda (Summary)

Committee Members: Rachel (chair), Lewana, Walt, Suni, Linda

1. Call meet to order – Rachel, VP Admin., Chair of Bylaws/Policy Committee
2. Attendees: Rachel, Linda, Suni, Walt (Lewana was not able to attend)
3. **Old Business**: Updates/reports on Action Taken from March 2, 2021 meeting
   a. <u>Linda</u> – options to diversify our funds into checking and savings accounts at Arvest. Recommendation of (and vote on?) a formula for how much to keep in checking versus investment account. Rachel – Should make a notation that we were reviewing and approving written documents that are attached to the minutes.
      Actions taken:
      1. Motion made, seconded and approved to recommend to the Board the following: that a new banking policy be adopted re: transferring resources from checking into a Business Money Market Account.
         - Walt – will prepare the banking policy
         - Linda – will prepare the report regarding transferring $15,000 from the Business Checking account to the Business Money Market Account at Arvest.
         - Both items above will be placed on Agenda for June 2021 board meeting.
      2. Motion made, seconded and approved to recommend to the Board the following: we transfer $15,000 from Arvest business checking account into an Arvest Business Money Market Account.

   b. <u>Walt</u> – update from checking with other chapters and Erin Murphy at ATD re: bundling price options and options for recording meetings and distributing the recordings.

      Action taken:

      1. Re: <u>bundling</u> options - Can only bundle chapter items; ATD does not offer bundling. Motion made, seconded, and approved to table this topic and revisit it later in the year.
      2. Re: <u>recording</u> options – After Walt reported on various recording options that other chapters are using, a motion was made, seconded, and approved to table this topic until Q3 when we have more information on copyright, proprietary information, etc. from Barbara Ingrassia's workshop that will be presented as our June 18th program.

Note: from the March 16 NAC call that I attended, Debbie Richardson (Houston chapt) mentioned they put recordings on their own YouTube channel & only available to members. She didn't indicate if only for members who had paid for the meeting.

c. Vote on Section 7.2, p. 15 Bylaws/Policies change – just to say "meet" instead of the current wording that specifies meeting physically (for the member meetings)
Action taken:
Motion made, seconded, and approved to recommend to the Board the following: to strike from the Bylaws the word 'physically' and 'in person' to just say 'meet' in all amendments in the Bylaws where it currently exists.
   - This will be voted on by members in conjunction with the 2021/2022 elections.

d. Decide on changing name of VP of Marketing to VP of Communications
Action taken:
Motion made, seconded, and approved to recommend to the Board the following:
1. Eliminate Article IV (to eliminate the VP of Digital Media position)
2. Move VP of Digital Media responsibilities to VP of Marketing responsibilities
3. Rename VP of Marketing to VP of Communications
4. Make technical adjustments in the Bylaws text to reflect the above
5. Make changes in Policies/Procedures to match the above Bylaw changes

Board would make recommendation to members to approve above items 1 through 4 related to Bylaws changes.
   - This will be voted on by members in conjunction with the 2021/2022 elections.

4. **New Business:**
   - 2020 Risk Assessment Policies to be updated:
     o Action Item before May 18 meeting: Rachel requests that committee members take a few minutes to review sample templates in The Nonprofit Policy Sampler (attached) to address the following **additions** to our Bylaws/Policies:
       ▪ document retention – (scroll to Section 5)
       ▪ whistleblower protection policy – (scroll to Section 7)
       ▪ conflict of interest – (scroll to Section 8)
     o Consider which section you want to volunteer to work on – to create this for our chapter.
   Action Taken:
   Walt and Rachel – will work on verbiage for Conflict of Interest
   Lewana and Rachel – will work on verbiage for Whistle Blower

Suni and Linda – will work on verbiage for Document Retention

Templates with verbiage will be presented at next Bylaws/Policy Committee meeting Date TBD.

After verbiage on the 3 template drafts are presented at next Bylaws/Policy meeting, they will be presented at Board meeting for approval.

Conflict of Interest draft/template to be ready for August Board meeting.
- o We will plan for committee members to share their sample verbiage at the June 7th Board Meeting…to be voted on by the Board.

Rachel will send email with date options for next Bylaws/Policy committee meeting – will be sometime in July.

1) The ATD Tulsa Chapter shall maintain a checking account within a bank with branches in Oklahoma.
2) In addition to a checking account, the ATD Tulsa Chapter shall maintain a Money Market Account within a bank with branches in Oklahoma.
3) The ATD Tulsa Chapter shall maintain in the checking account a balance sufficient to cover average monthly operating expenses.
4) The balance in the Money Market Account shall not be less than $2,500, or the minimum required by the banking institution.
5) The balance in the Money Market Account shall be available to transfer into checking on an as-needed basis without incurring fees or penalties.

Recommendation: Transfer $15,000 from Arvest Business Checking Account into an Arvest Business Money Market Account

1. Current balance in Business Checking account is $21,989.28

2. In 2019, Checking account balance was down to $15,000 for a short period, post statewide conference transactions because funds were being held in PayPal account rather than being transferred to the Arvest Checking account. PayPal account was closed last year. Now all Wild Apricot payments are processed though AffiniPay and deposited directly into our Arvest Checking account.

3. Transferring $15,000 to Money Market account leaves $6,989.28 in the checking account.

4. Transfer to Business Money Market account because interest is compounded monthly. Interest is compounded quarterly for Business Savings accounts.

ATD TULSA CHAPTER Association for Talent Development

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

TDTulsa.org   Admin@TDTulsa.org

BUSINESS MONEY MARKET

Earn Interest Without Losing Access to Funds

The Business Money Market account allows businesses to set aside funds that can be easily accessed when necessary. Due to the rate structure, the more money held in the account, the higher the interest rate.

Benefits of the Business Money Market Account Include:

- Unlimited deposits
- Unlimited Arvest ATM withdrawals and over-the-counter withdrawals (Using a special Money Market withdrawal slip)
- Itemized monthly statements
- Up to six withdrawals per monthly statement cycle
- Avoid a $15 monthly service fee by maintaining a $2,500 daily balance
- Earned interest rate is tiered for higher rates on larger balances:
  - Tier 1: $0 - $2,499.99
  - Tier 2: $2,500 - $9,999.99
  - Tier 3: $10,000 - $99,999.99
  - Tier 4: $100,000 - $249,999.99
  - Tier 5: $250,000 - $4,999,999.99
  - Tier 6 - $5,000,000+
- Minimum to open: $100

CONNECT WITH OUR BUSINESS SPECIALISTS

GIVE US A CALL
(855) 249-4930

FIND YOUR LOCAL ARVEST BRANCH

City, State or Zip   Go

Important Deposit Account Disclosure Information:

1. Fees are subject to change with prior notice, at the bank's discretion.
2. Fees could reduce earnings on interest-bearing accounts.
3. Complete deposit account disclosures containing terms and fee information are available on request.
4. Accounts left unattended for long periods of time may be charged Dormant Account fees. See a financial sales representative for details.

MONEY MARKET ACCOUNT†

Balance	APY	Interest Rate
$0 - $2,499.99	0.05%	0.05%
$2,500 - $9,999.99	0.05%	0.05%
$10,000 - $99,999.99	0.05%	0.05%
$100,000 - $249,999.99	0.10%	0.10%
$250,000 - $4,999,999.99	0.10%	0.10%
$5,000,000 and Up	0.15%	0.15%
Money Market with Qualified Checking*	Premium rate with qualifying checking. Lear

Account has variable rates subject to change.

*Relationship Checking Accounts include Preferred Club, Private Banking and Investor Account.

Interest is compounded and credited monthly unless otherwise noted.

†May be subject to a monthly fee if balance falls below $2500.

BUSINESS SAVINGS

Earn Interest While Building Savings

Arvest's Business Savings account provides a place for excess cash reserves while limiting easy access to it and overextending the business.

Benefits of the Business Savings Account Include:

- Unlimited deposits
- Unlimited Arvest ATM withdrawals when the account is linked to an ATM/Debit Card
- Earns interest paid quarterly on all daily collected balances of $100 or greater
- Up to six withdrawals per month
- Itemized quarterly statements
- Monthly service charge may be avoided by either:
    Maintaining a daily balance of $100
    Maintaining an average balance of $500
- Minimum to open: $100

SAVINGS ACCOUNTS

	Minimum Balance	APY	Interest Rate
Savings	$100.00	0.05%	0.05%
Savings With Qualified Checking*	Premium rate with qualifying checking. Learn more.		

Account has variable rate subject to change. Interest will be compounded and credited quarterly.

*Relationship Checking Accounts include Preferred Club, Private Banking and Investor Account.

Interest is compounded and credited monthly unless otherwise noted.

CONNECT WITH OUR BUSINESS SPECIALISTS

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FIND YOUR LOCAL ARVEST BRA
City, State or Zip   Go

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ssionals to Develop Talent in the Workplace

Association for
Talent Development

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

Assets			**Liabilities**		
Arvest Checking Account	$	21,348.46	Accounts Payable	$	-
Cash	$	73.30	Taxes Payable	$	-
Accounts Receivable in Wild Apricot*	$	-	**Total Liabilities**	$	-
(Less doubtful accounts)**		$0.00			
			Net Assets Unrestricted Net Assets	$	21,421.76
			Temporarily Restricted Net Assets	$	-
			Permanently Restricted Net Assets	$	-
Total Cash Assets	$	21,421.76	**Total Net Assets**	$	21,421.76
Total Assets	$	21,421.76	**Total Liabilities Plus Net Assets**	$	21,421.76

* Accounts Receivable (0 to 90 Days)

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

Prepared by Linda Jenkins, 2021 President on 6-2-21

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

Category Description	2020 Actual	2021 Approved Budget	May-21	2021 Total	Difference (+/-)	Notes
INCOME						
ATD ChIP/Membership Fees	$ 2,208.09	$ 1,500.00	$ 166.67	$ 1,650.85	$ (150.85)	3 Associate Memberships ($141.67) and 1 Student Membership ($25)
Meeting Fees	$ 3,730.00	$ 4,000.00	$50	$ 930.00	$ 3,070.00	$20 for 2 Guests @ May Program Mtg (Tips & Tricks in Zoom) & $30 for 3 Members @ June Program Mtg (Copyright)
Membership Dues	$ 2,875.00	$ 5,150.00		$ 625.00	$ 4,525.00	
ATD Meeting Sponsorship	$ 250.00	$ 1,000.00		$ -	$ 1,000.00	
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	$ 400.00		$ -	$ 400.00	
Special Event - State Conference	$ -	$ 10,000.00		$ -	$ 10,000.00	
Special Event- State Conference Sponsorships	$ -	$ 3,000.00		$ -	$ 3,000.00	
TOTAL INCOME	**$ 9,253.09**	**$ 28,550.00**	**$ 216.67**	**$ 3,205.85**	**$ 25,344.15**	
	$ -			$ -	$ -	
EXPENSES	$ -			$ -	$ -	
Board Expense	$ -			$ -	$ -	
National ATD Dues	$ -	$ -		$ 179.00	$ (179.00)	
Retreat	$ -	$ 120.00		$ -	$ 120.00	
ATD Leader's Conference (ALC)	$ 700.00	$ 3,500.00		$ -	$ 3,500.00	
Treasurer Expense	$ 7.50	$ 350.00		$ -	$ 350.00	
Annual Audit	$ 1,200.00	$ 1,300.00	$ 630.00	$ 630.00	$ 670.00	Per invoice, payment of half of the $1,260 fee for preparation of annual compliation report by M&M Consulting (NextGen)
TOTAL Board Expense	**$ 1,907.50**	**$ 5,270.00**	**$ 630.00**	**$ 809.00**	**$ 4,461.00**	
	$ -			$ -	$ -	
Communications Expense	$ -			$ -	$ -	
GoDaddy Domains	$ 84.68	$ -		$ -	$ -	
Go Daddy Email	$ 119.76	$ 540.00		$ 575.04	$ (35.04)	
Wild Apricot Web Site	$ 1,536.00	$ 1,700.00	$ 1,536.00	$ 1,536.00	$ 164.00	Annual payment for use of Wild Apricot ATD Tulsa website
SurveyMonkey & Virtual Meeting Subscriptions	$ 408.00	$ 808.00		$ 408.00	$ 400.00	
PO Box Subscription	$ 92.00	$ 92.00		$ 118.00	$ (26.00)	
Marketing	$ -	$ 250.00		$ -	$ 250.00	
TOTAL Communications Expense	**$ 2,240.44**	**$ 3,390.00**	**$ 1,536.00**	**$ 2,637.04**	**$ 752.96**	
	$ -			$ -	$ -	
Meeting Expense	$ -			$ -	$ -	
Facility Charge	$ 220.00	$ 500.00		$ -	$ 500.00	
Meals-Food	$ 778.11	$ 2,000.00		$ -	$ 2,000.00	
ATD December Special Program	$ 141.69	$ 200.00		$ -	$ 200.00	

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Recognition Items	$ -	$ 700.00		$ -	$ 700.00	
TOTAL Meeting Expense	$ 1,139.80	$ 3,400.00	$ -	$ -	$ 3,400.00	
	$ -			$ -	$ -	
Membership Expense	$ -			$ -	$ -	
Name Badges	$ 309.73			$ -	$ -	
Membership Development/Appreciation	$ 200.00	$ 400.00		$ -	$ 400.00	
New Member Appreciation/Recognition	$ -	$ 400.00		$ -	$ 400.00	
TOTAL Membership Expense	$ 509.73	$ 800.00	$ -	$ -	$ 800.00	
	$ -			$ -	$ -	
Misc. Expenses	$ -			$ -	$ -	
Online Payment Processing Expense	$ 280.70	$ 1,000.00	$ 27.79	$ 141.78	$ 858.22	Monthly AffiniPay online payment processing expenses.
Oklahoma ATD State Conference	$ -	$ 10,000.00		$ -	$ 10,000.00	
Other Special Event Expense	$ -	$ 1,500.00		$ -	$ 1,500.00	
Insurance	$ 970.60	$ 1,200.00	$ 50.82	$ 765.32	$ 434.68	1 monthly general liability insurance payment
TOTAL Misc Expense	$ 1,251.30	$ 13,700.00	$ 78.61	$ 907.10	$ 12,792.90	
	$ -			$ -	$ -	
TOTAL EXPENSES	$ 7,048.77	$ 26,560.00	$ 2,244.61	$ 4,353.14	$ 22,206.86	
	$ -			$ -	$ -	
OVERALL TOTAL	$ 2,204.32	$ 1,990.00	$ (2,027.94)	$ (1,147.29)	$ 3,137.29	

Prepared by Linda Jenkins, 2021 President on
6-2-21

May Board Member Report

Tuesday, June 1, 2021

Total Membership as of 5/31/21: 81 (-1)
PM: 54 (No change) (7 Past due)
Tulsa: 24 (-1)
Student: 2 (No change)
Student PM: 1 (no change)
PM/Membership: 66% (+1%)

New Members as of May 2021:
No new members in May

Renewing Members as of May 2021:
No renewing Members in May

Power Members Past Due as of 5/31/2021:
Vickie Corraro, AAA Club Alliance - 4/30/2021-Walt to reach out. I sent email 5/24/2021
Tanisha Guidry, ONE Gas - 4/30/2021-Lewana to contact. I sent email 5/24/2021
Eugene Harris, ONE Gas - 4/30/2021-retired- I sent email 5/24/2021-it bounced back
Leslie Melvin, Tulsa Federal Credit Union - 4/30/2021-I sent email 5/24/2021
Jill Almond, St Francis Health Systems - 5/31/2021
Ashley Earl, Tulsa Federal Credit Union - 5/31/2021
Cecilia Martin-Smith, CAP Tulsa - 5/31/2021

Member event for June
June 29, 3:30-4:30, ATD National presenting on Values of ATD Membership and how to use them
Ideas for July event?

1. **Name/Title/Credentials:** (*to appear in promotional/marketing materials):*
   Barbara C. Ingrassia, President, Manage Copyright   Copyright Compliance Strategist,
   Speaker, Workshop Facilitator, Digital Content Licensor.   MLS, AHIP, CCM, DCL

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

   Copyright Law for Learning Professionals: Shedding Some Light

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."**

Copyright Literacy is a 21st century life skill.

***How can you as a learning professional find and use others' content safely and legally in your mission to develop talent in the workplace? ***
***How can you as a learning professional protect the content *you* create? ***
How can you raise your audience's awareness of the role of copyright in their lives—offering them a life skill for their work and personal lives?

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

Some learning professionals create content and use others' content. (Why reinvent the wheel?) In this interactive overview, we'll explore and shed some light on the often-confusing role of copyright law in this process. How can you find and use others' content safely and legally? How can you protect the content *you* create? How can you raise your audience's awareness of the role of copyright in their lives? At the end of our conversation, you will have a better understanding of common copyright terms/concepts.

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.)*

Some learning professionals create content and use others' content. (Why reinvent the wheel?) In this interactive overview, we'll explore and shed some light on the often-confusing role of copyright law in this process. How can you find and use others' content safely and legally? How can you protect the content *you* create? How can you raise your audience's awareness of the role of copyright in their lives?

At the end of our conversation, you will have a better understanding of common copyright terms/concepts, such as:
- Copyright Protects/Doesn't Protect
- Securing Copyright/ Copyright Status
- Exclusive Rights of the Copyright Owner (Who is the owner?)

- Attribution vs. Permission
- Licenses (Creative Commons)
- Fair Use
- Public Domain
- Copyright vs. Trademark
- Plagiarism vs. Copyright Infringement

You will identify at least one idea you can implement immediately to further strengthen your training programs.

Bring your challenges and concerns about the gray murky maze that is copyright in the digital age.

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

   Building Personal Capability: Compliance & ethics, Communication, Lifelong Learning
   Developing Professional Capability: Instructional Design, Knowledge Management, Training Delivery & Facilitation

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 webinar, participants will be able to apply copyright concepts to their daily work and develop best practices.
   - After participating in this webinar, participants will be able to use various types of 3rd party content safely and legally.
   - After participating in this webinar, participants will be able to define and differentiate their roles, responsibilities, and rights as both **consumers** and **creators** of copyright -eligible content.
   - After participating in this webinar, participants will be able to raise their audience's awareness of the role of copyright in their lives—offering them a life skill for their work and personal lives.
   - After participating in this webinar, participants will be able to determine personal goals for continuing education around copyright.

8. **Workshop Design Plan:**

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

- Introductions and overview: Levels of experience with Copyright?
- What is COPYRIGHT?
- Q+A
- Three types of 3rd party content: How to use safely and legally
- Share experiences. Q+A.
- What about licenses?
- Protect what YOU create
- Q+A
- Next steps: Best practices
- Identify at least one idea to implement immediately to further strengthen your training programs.

9. **Handout / Performance Tools:**

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

An e-workbook of key concepts and questions to encourage engagement and interaction.

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.

Please provide a virtual link. Thank you.

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.

Masters in Library Science
Certificate in Copyright Management from the Special Libraries Association
Certificate in Digital Content Licensing from CopyrightLaws.com
Certificate in Copyright Leadership from CopyrightLaws.com
Studied the "murkiness" of copyright law with the Center for Intellectual Property at the University of Maryland, Duke University, and the Berkman Center at Harvard Law School.

Recent presentations: Please see email attachment for additional presentations

- Ingrassia, B.C. Virtual Presentation. **What Does Copyright Have to do with Your VA Biz Growth?** Online International Virtual Assistants Convention. May 22, 2021.
- Ingrassia, B.C. Virtual Presentation. **Why Copyright Law Matters to Your Business.** Rochester (NY) Professional Consultants Network. May 14, 2021.
- Ingrassia, B.C. Virtual Presentation/Class **Guard Your Online Goldmine.** Open Registration. May 13, 2021.
- Ingrassia, B.C. Virtual Presentation**. International Copyright Law-and World Intellectual Property Day.** Leading Innovation in Cultivating Communications. April 21, 2021.
- Ingrassia, B.C. Virtual Presentation. **Shedding Some Light on Copyright.** Personal Historians Northeast network. December 6, 2020.
- Ingrassia, B.C. Virtual Presentation **Copyright Skills as Risk Management Tools: The VA's Role**. Kathy Goughenour's Expert VA® Program. November 18, 2020.
- Ingrassia, B.C. Virtual Presentation. **Protect Your Content: Guard Your Goldmine**. Public Speakers Association. November 11, 2020.
- Ingrassia, B.C. Virtual Presentation. **What Every Speaker Needs to Know About Copyright Law.** Speakers Academy. National Speakers Association. Northern California Chapter. August 24, 2020.
- Ingrassia, B.C. Virtual Presentation. **What Every Speaker Needs to Know About Copyright Law.** International Speakers Network. June 2, 2020.
- Ingrassia, B.C. Virtual Presentation/Workshop. **Copyright Skills as Risk Management Tools: The Librarians' Role**. Indiana Health Sciences Libraries. March 24+31, 2020. (This course approved by the Medical Library Association to award CE.)

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.

    A. *I have requested aggregate evaluation data from CEU workshops presented on behalf of the Medical Library Association. (Five 4-hour workshops presented in 2018, 2019, 2020: 3 in-person, 2 virtually in two 2-hour sessions) See below*

Copyright Skills as Risk Management Tools:
The Librarian's Role
All course summary (Medical Library Association CEU)
Evaluation Summary

Did the course meet your expectations?
Responses to Choices 0 (a) Did not meet any of my expectations 0 (b) Met almost none of my expectations 6 (c) Met some of my expectations 22 (d) Met most or all of my expectations
13 (e) Exceeded my expectations
Total responses: 41

I found this course to be engaging.
Responses to Choices 0 (a) Strongly disagree 2 (b) Disagree 19 (c) Agree 20 (d) Strongly agree
Total responses: 41

How likely are you to recommend this course to a colleague?
Responses to Choices 0 (a) Will not recommend 3 (b) Unlikely
20 (c) Likely 18 (d) Very likely
Total responses: 41

B. *Links to me "in action"*

Manage Copyright. Don't Let It Manage You! https://youtu.be/UuSLNzpYUbc

How to Protect Your Business with Copyright Law (Innovation Women. August 2019) https://fb.watch/5zDxArdn0E/
C. https://www.facebook.com/watch/live/?v=415285315776575&ref=watch_permalink

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

To appear in workshop promotional/marketing materials

Since 2008, Barbara Ingrassia has studied and explored the role of copyright in the digital age as she has empowered thousands of content creators to protect the intellectual property that is their goldmine.
Whether she is delivering tuition-based workshops for professional organizations such as the Medical Library Association, the Training Magazine Network, or the Virtual Expert Training Program, or consulting directly with content creators, clients get straight talk and actionable strategies that save them time and legal hassle and expense should anyone attempt to misuse their content.
A frequent podcast guest expert on shows such as Melanie Benson's *Amplify Your Success*, Dr. Shirlene Reeves' *Ask the Expert*, and Katrina Sawa's *International Speaker Network*. Barbara enjoys bringing a sense of fun to what some may consider a dry topic. Check out her website at Manage Copyright dot com.
Barbara earned a Certification in Copyright Management from the Special Libraries Association and has studied the "murkiness" of copyright law with the Center for Intellectual Property at the

University of Maryland, Duke University, and the Berkman Center at Harvard Law School. She also has Certification in Digital Content Licensing from Copyright Laws dot com.

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.

Charles "Chuck" Hooper
email: Chuck@Speakerpresenter.com
cell: 209-988-5070
Address: 8214 Peregrine Way
          Citrus Heights CA 95610
(Dean, NSA Speakers Academy. Northern CA)

Barbara Barry
3608 Dunnington Rd.
Beltsville, MD 20705
401-749-2594
Barbara@barrybasic.com

(Educator. Webinar participant)

(Ms.) Rhonda L. Bowen

insight and support for communication across cultures

bells

+49 2153 954 9996

rhonda@rhondalbowen.me

www.rhondalbowen.me

Hohlweg 8, 41334 Nettetal, GERMANY

Make an appointment: https://bit.ly/RhondaInspiration15

For your convenience, she recommends that you contact her by email or make an appointment. THANK YOU.

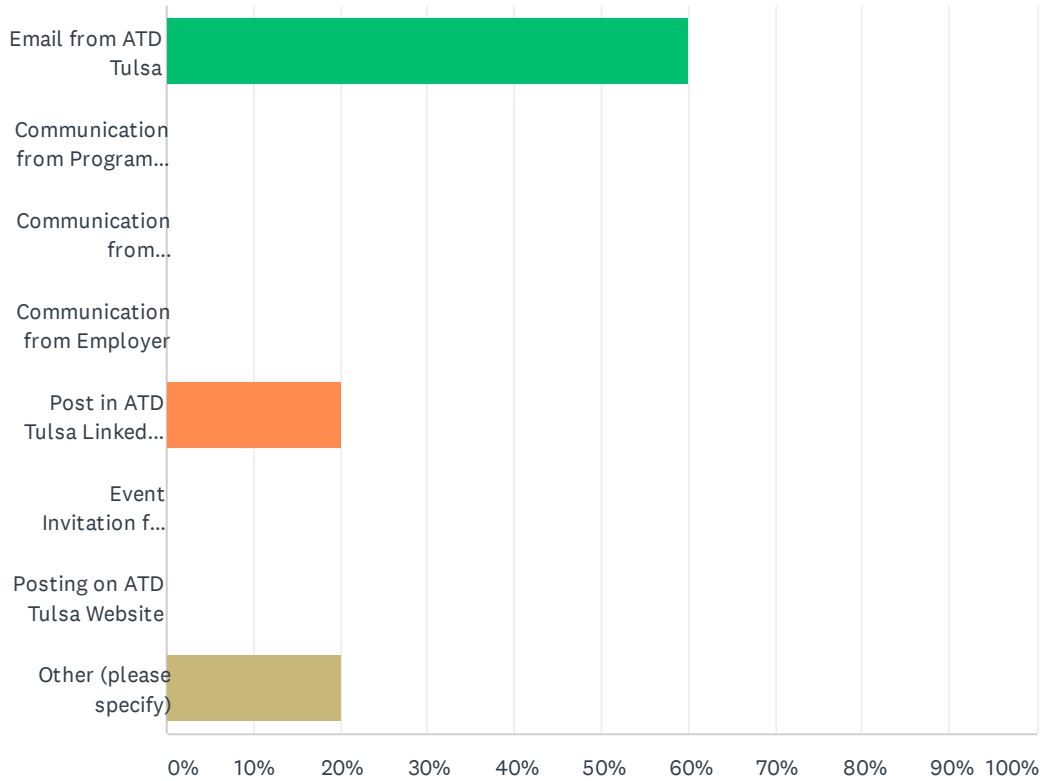16. **Professional Photo:**

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

For workshop promotional/marketing materials

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

Answered: 5   Skipped: 0

ANSWER CHOICES	RESPONSES	
Email from ATD Tulsa	60.00%	3
Communication from Program Presenter(s)	0.00%	0
Communication from Colleague/Friend	0.00%	0
Communication from Employer	0.00%	0
Post in ATD Tulsa LinkedIn Group	20.00%	1
Event Invitation from ATD Tulsa's Facebook Page	0.00%	0
Posting on ATD Tulsa Website	0.00%	0
Other (please specify)	20.00%	1
TOTAL		5

#	OTHER (PLEASE SPECIFY)	DATE
1	Information shared during the previous month's program meeting	5/21/2021 1:32 PM

Q2 Why did you attend this ATD Tulsa Program Meeting? Check all that apply.
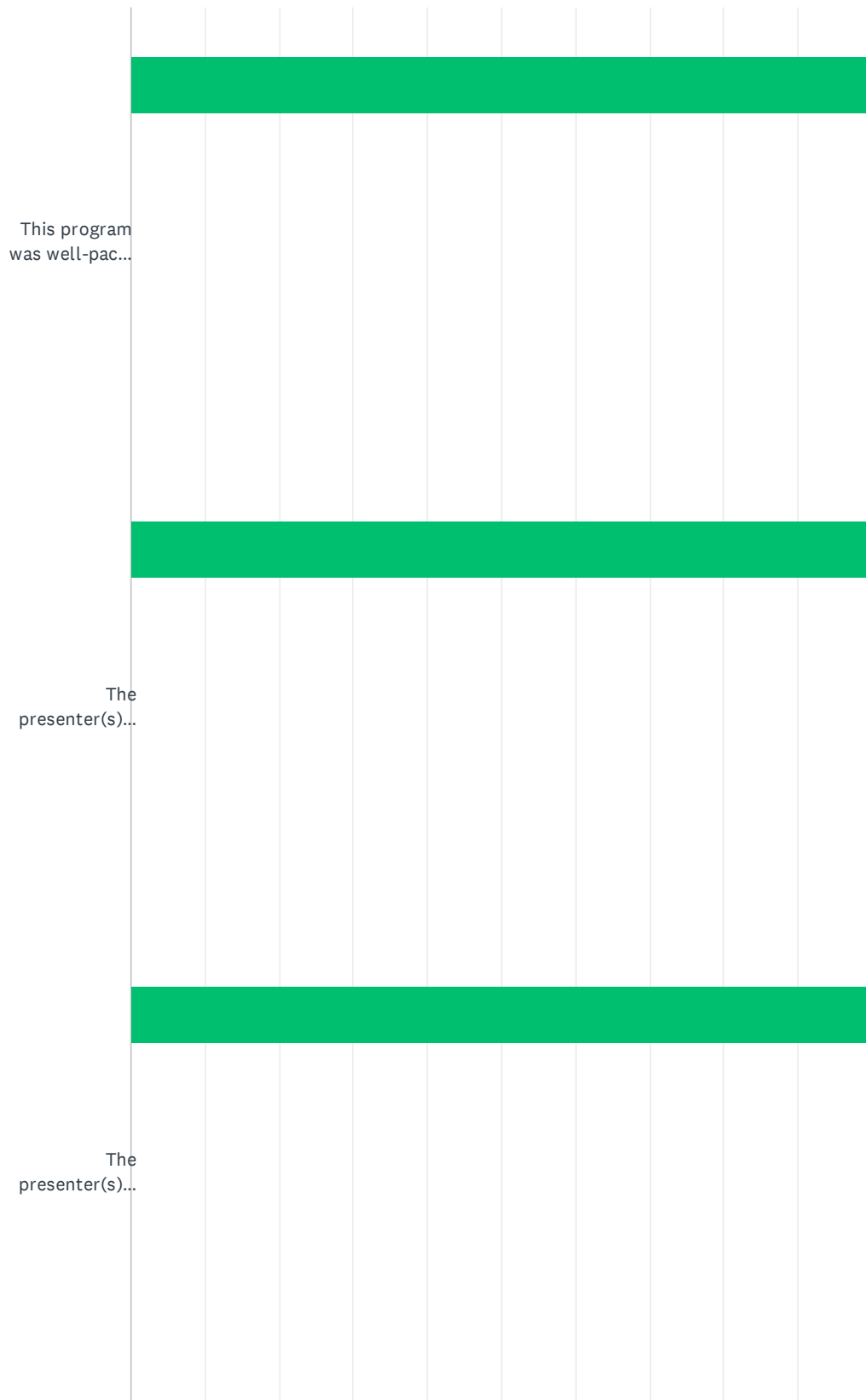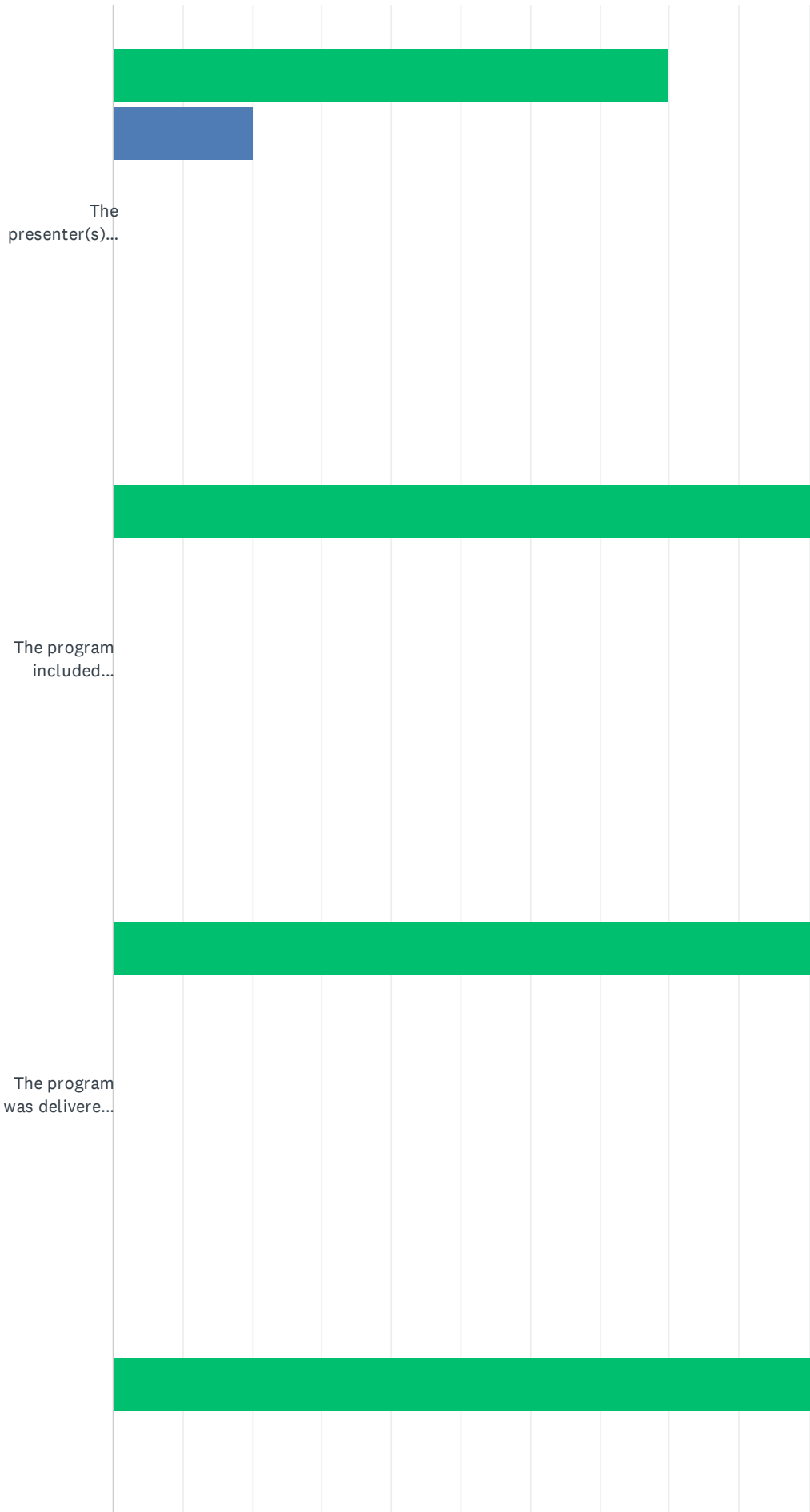
Answered: 5   Skipped: 0
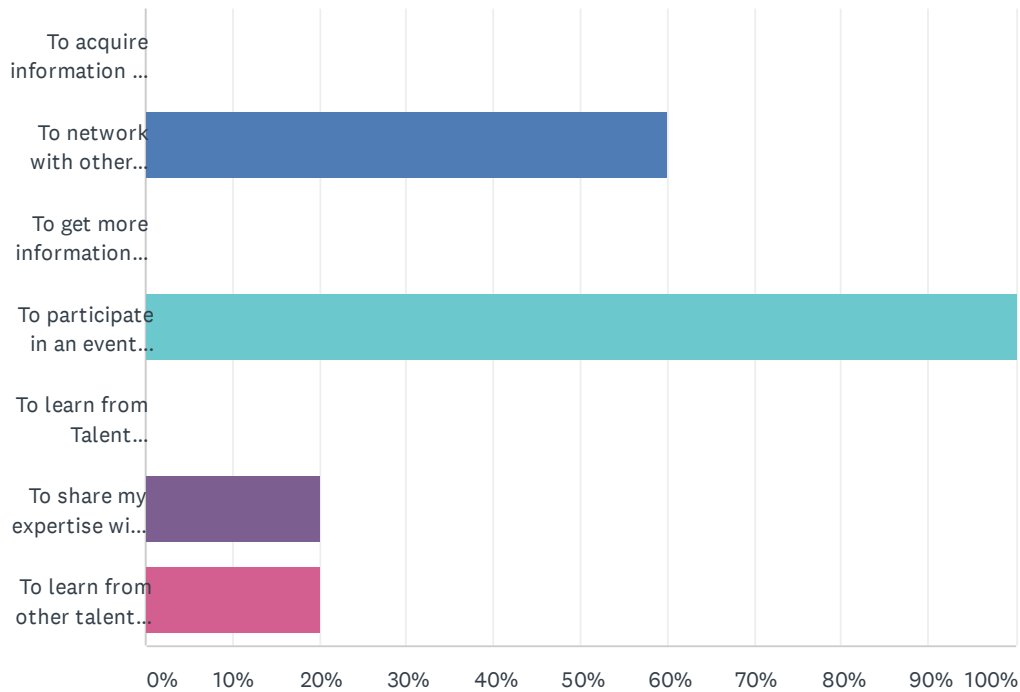
ANSWER CHOICES	RESPONSES	
To acquire information on developments in the talent management industry.	0.00%	0
To network with other talent management professionals.	60.00%	3
To get more information about ATD Tulsa.	0.00%	0
To participate in an event delivered by the presenter(s).	100.00%	5
To learn from Talent Management industry leaders.	0.00%	0
To share my expertise with other talent management professionals.	20.00%	1
To learn from other talent management professionals attending the program meeting.	20.00%	1
Total Respondents: 5		

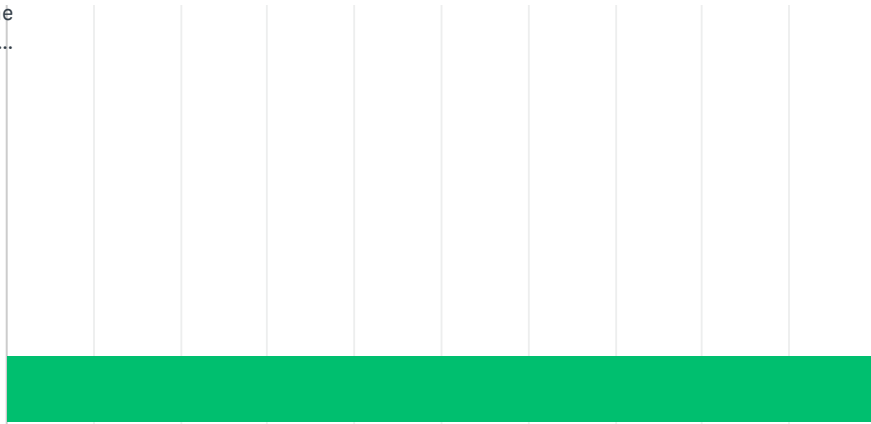| #	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

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

Answered: 5   Skipped: 0
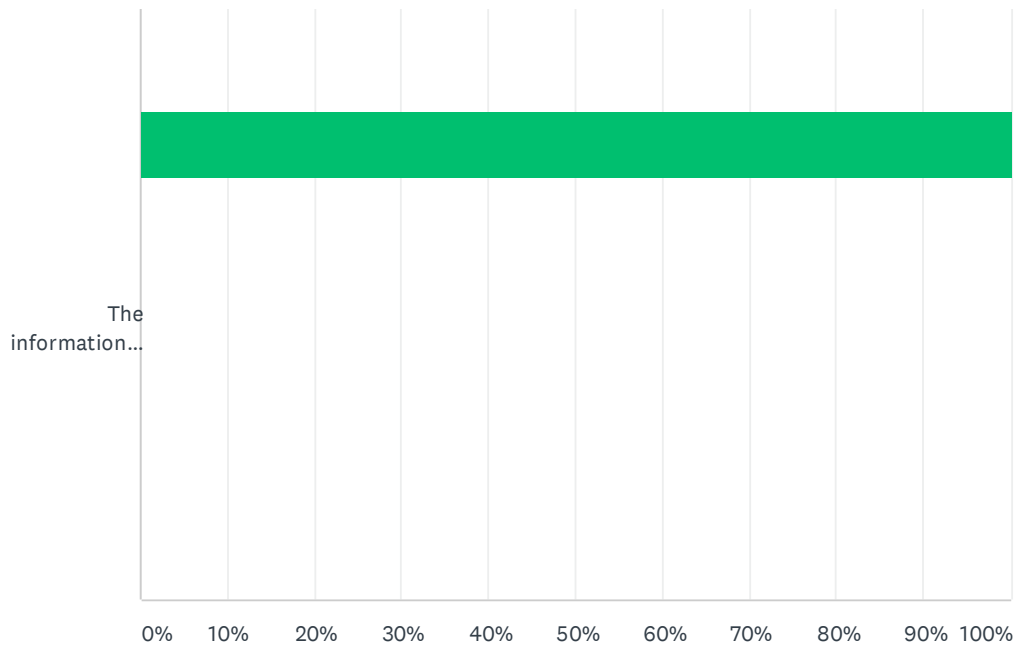
This program was well-pac...

The presenter(s)...

The presenter(s)...

May 21, 2021 Program Meeting Survey - Tips and Tricks for Training in Zoom

The
presenter(s)...

The program
included...

The program
was delivere...

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The presenter(s)...

The presenter(s)...

The information...

The information...

May 21, 2021 Program Meeting Survey - Tips and Tricks for Training in Zoom


	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.	100.00% 5	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	5
The presenter(s) demonstrated subject matter expertise and knowledge.	100.00% 5	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	5
The presenter(s) was (were) engaging.	100.00% 5	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	5
The presenter(s) allowed the right amount of time for discussion.	80.00% 4	20.00% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	5
The program included hands-on learning activities.	100.00% 5	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	5
The program was delivered as promoted.	100.00% 5	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	5
The presenter(s) outlined objectives for their session.	100.00% 5	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	5
The presenter(s) met the objectives as outlined.	100.00% 5	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	5
The information presented during this program was well organized.	100.00% 5	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	5
The information presented during this program is useful to my job.	100.00% 5	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	5
The information presented during this program can be applied to my business.	100.00% 5	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	5

Q4 How likely are you to recommend the session facilitator to other organizations?

Answered: 5   Skipped: 0
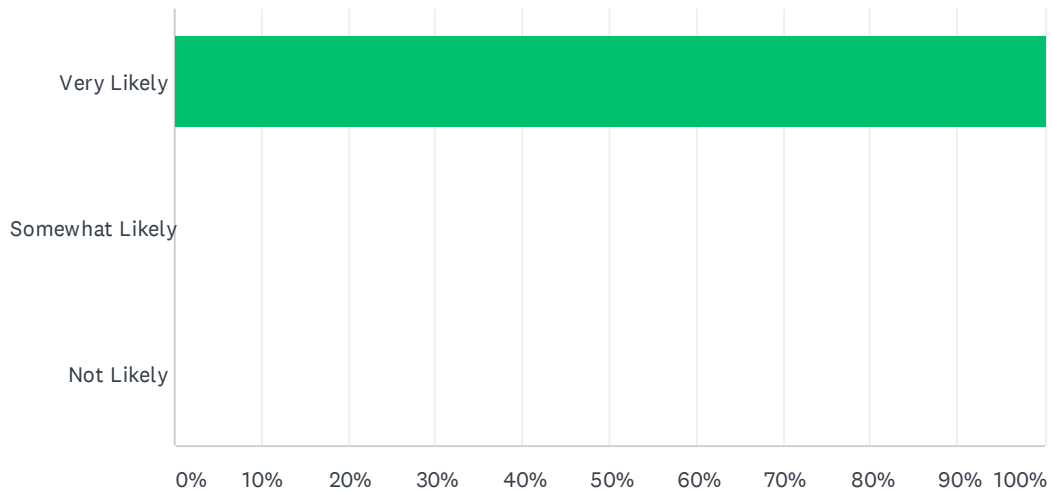
ANSWER CHOICES	RESPONSES	
Very Likely	100.00%	5
Somewhat Likely	0.00%	0
Not Likely	0.00%	0
TOTAL		5

#	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.	

Q5 What were your top one or two takeaways from this session?

Answered: 4   Skipped: 1

#	RESPONSES	DATE
1	Using annotation tools with whiteboard and slides	5/21/2021 10:04 PM
2	Whiteboard options and scrolling additional whiteboards	5/21/2021 1:54 PM
3	The ability to save multiple whiteboards was new to me!	5/21/2021 1:32 PM
4	Great zoom tactics - white board was new for me	5/21/2021 1:22 PM

Q6 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: 5   Skipped: 0

# May 21, 2021 Program Meeting Survey - Tips and Tricks for Training in Zoom
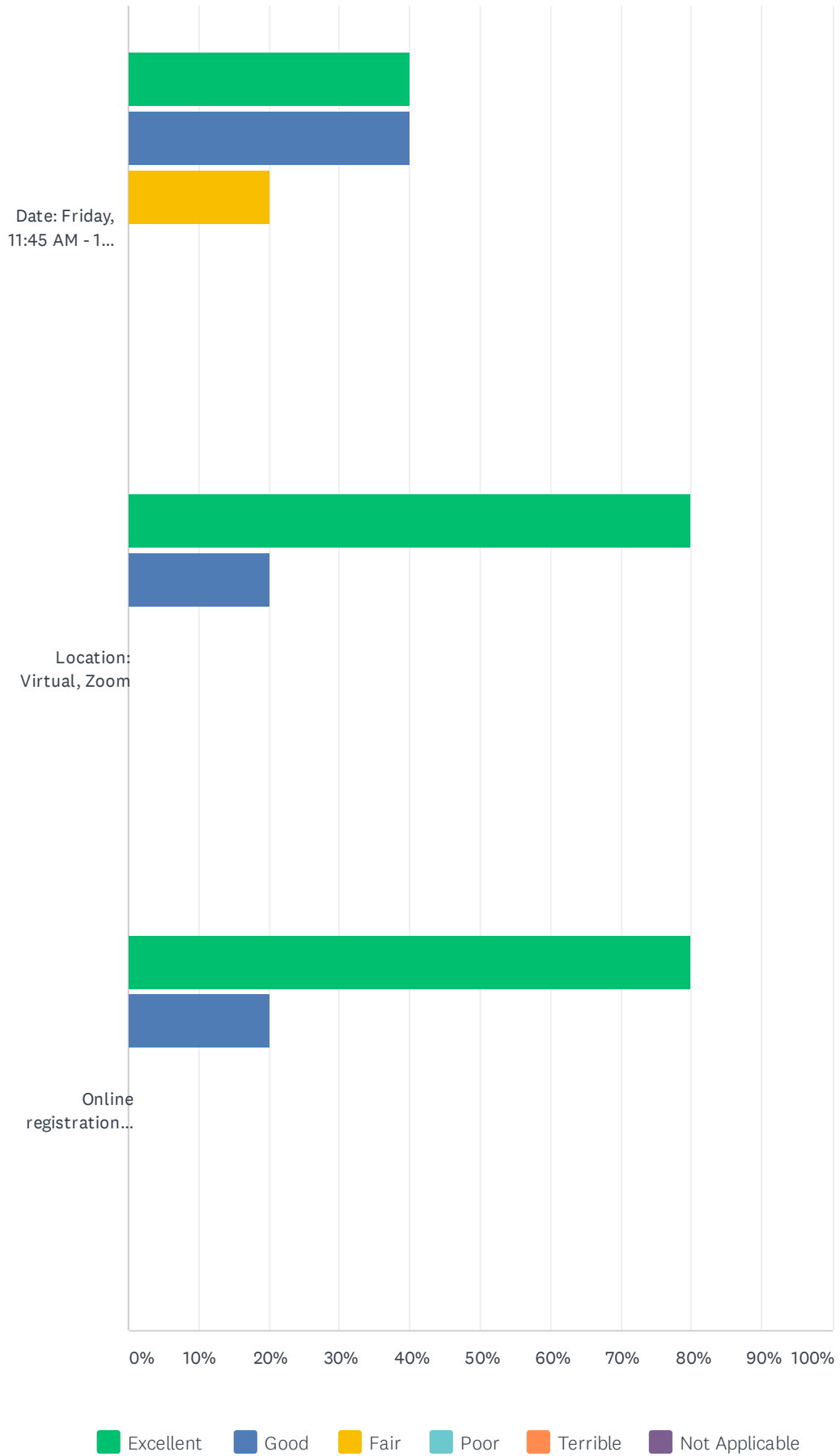
May 21, 2021 Program Meeting Survey - Tips and Tricks for Training in Zoom

	EXCELLENT	GOOD	FAIR	POOR	TERRIBLE	NOT APPLICABLE	TOTAL
Date: Friday, 11:45 AM - 1:15 PM	40.00% 2	40.00% 2	20.00% 1	0.00% 0	0.00% 0	0.00% 0	5
Location: Virtual, Zoom	80.00% 4	20.00% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	5
Online registration process	80.00% 4	20.00% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	5

	EXCELLENT	GOOD	FAIR	POOR	TERRIBLE	NOT APPLICABLE	TOTAL

Q7 Based on your experience at this ATD Tulsa program meeting, how likely are you to attend another program meeting?

Answered: 5   Skipped: 0
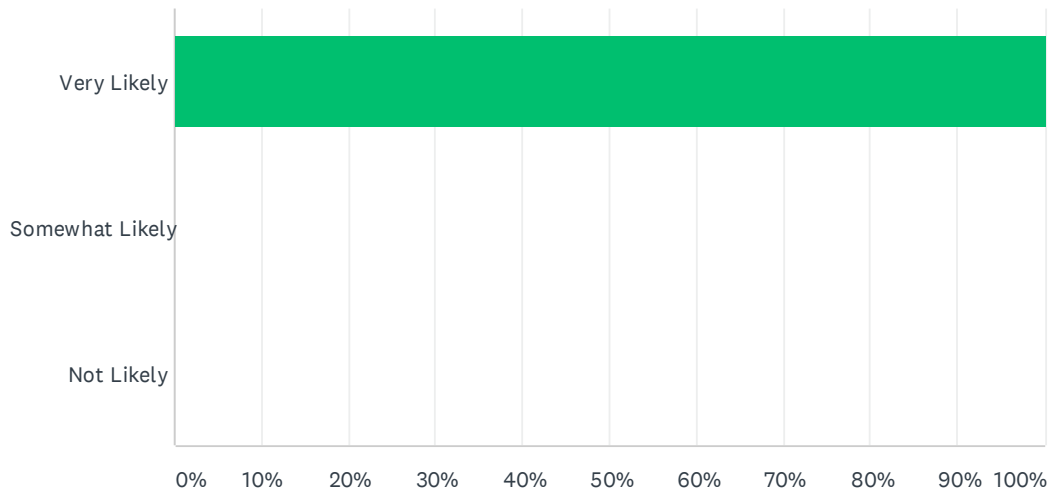
ANSWER CHOICES	RESPONSES	
Very Likely	100.00%	5
Somewhat Likely	0.00%	0
Not Likely	0.00%	0
TOTAL		5

| #	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.	

Q8 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: 1   Skipped: 4

#	RESPONSES	DATE
1	Be nice to have a program on VILT best practices e.g., do not read the information on your slides to your audience, put detailed information in handouts, do an activity to engage participants at least every 4 minutes	5/21/2021 10:04 PM

Q9 Which of the following ATD Capability Model topics are you most interested in seeing presented? Check all that apply.

Answered: 4   Skipped: 1
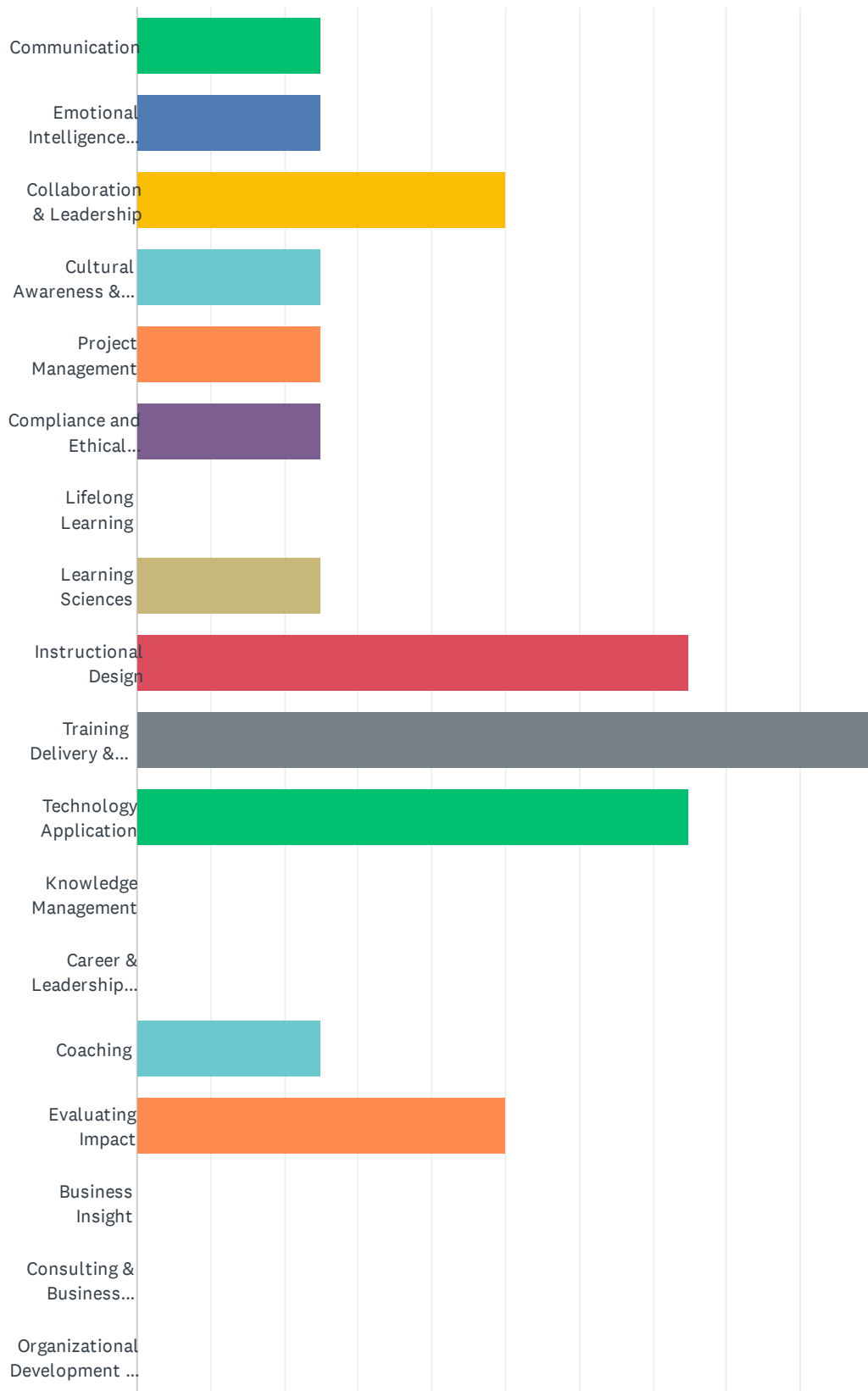
May 21, 2021 Program Meeting Survey - Tips and Tricks for Training in Zoom
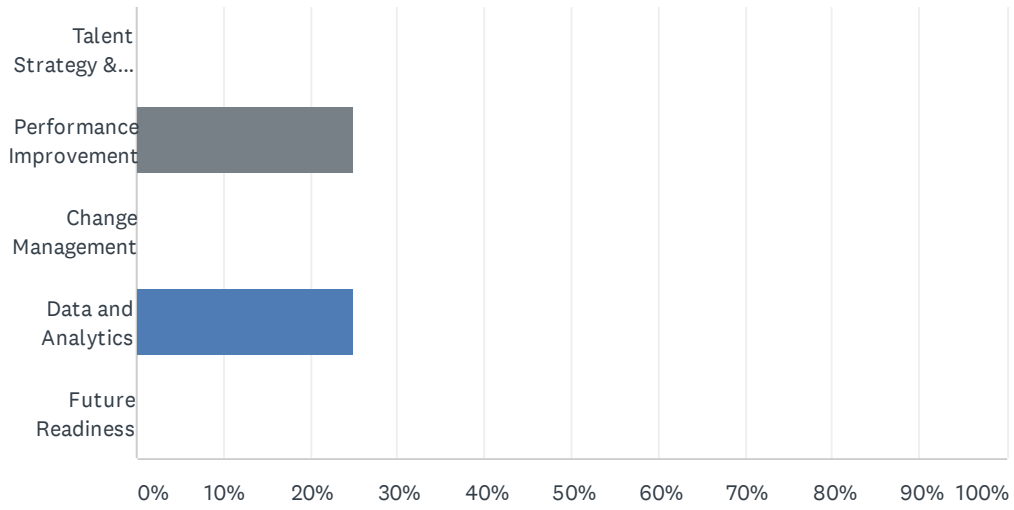
May 21, 2021 Program Meeting Survey - Tips and Tricks for Training in Zoom

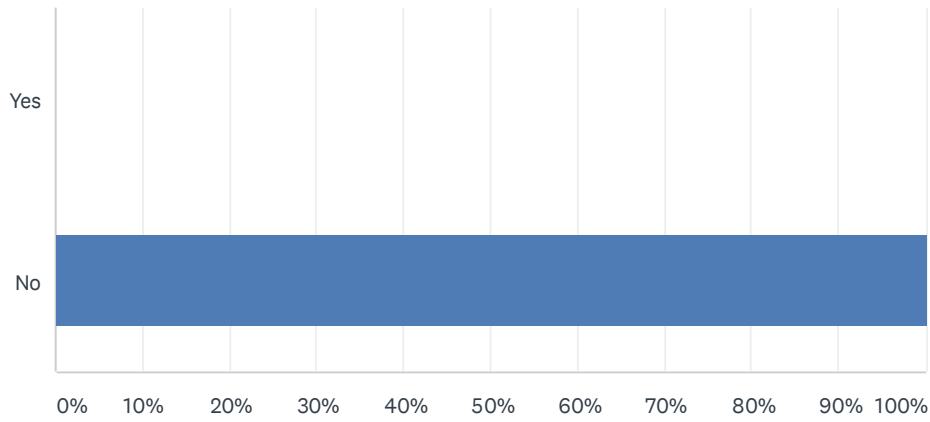| ANSWER CHOICES	RESPONSES	
Communication	25.00%	1
Emotional Intelligence & Decision Making	25.00%	1
Collaboration & Leadership	50.00%	2
Cultural Awareness & Inclusion	25.00%	1
Project Management	25.00%	1
Compliance and Ethical Behavior	25.00%	1
Lifelong Learning	0.00%	0
Learning Sciences	25.00%	1
Instructional Design	75.00%	3
Training Delivery & Facilitation	100.00%	4
Technology Application	75.00%	3
Knowledge Management	0.00%	0
Career & Leadership Development	0.00%	0
Coaching	25.00%	1
Evaluating Impact	50.00%	2
Business Insight	0.00%	0
Consulting & Business Partnering	0.00%	0
Organizational Development & Culture	0.00%	0
Talent Strategy & Management	0.00%	0
Performance Improvement	25.00%	1
Change Management	0.00%	0
Data and Analytics	25.00%	1
Future Readiness	0.00%	0
Total Respondents: 4		

Q10 Do you have any questions, comments or concerns? (If you would like for us to respond directly, please include your preferred contact information.)

Answered: 1   Skipped: 4

#	RESPONSES	DATE
1	Great session, Linda and Walt!	5/21/2021 1:32 PM

Q11 Was this the first time you attended an ATD Tulsa program meeting?

Answered: 5   Skipped: 0
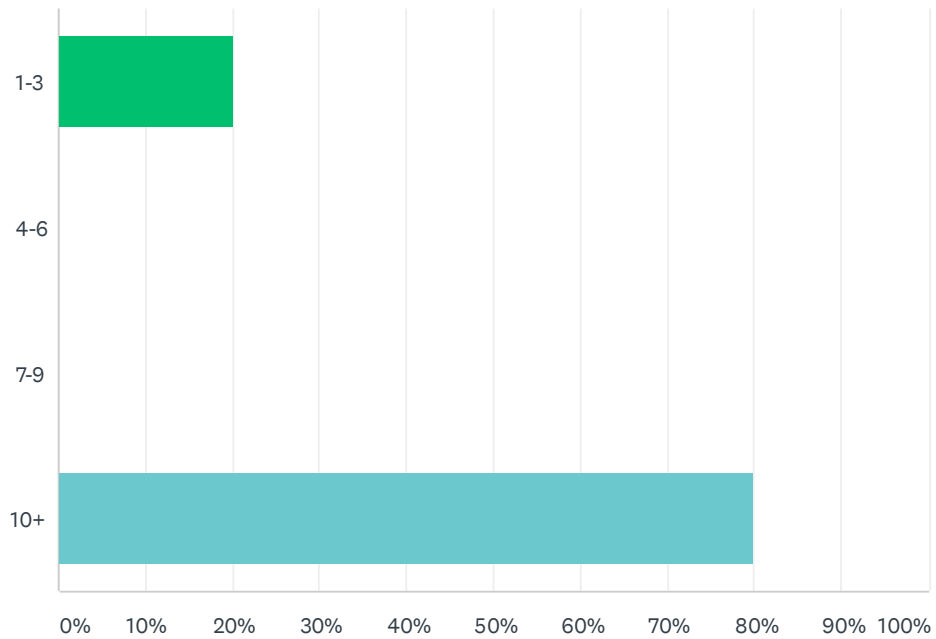

ANSWER CHOICES	RESPONSES	
Yes	0.00%	0
No	100.00%	5
TOTAL		5

Q12 If no, how many ATD Tulsa program meetings have you attended in the last year?

Answered: 5   Skipped: 0

ANSWER CHOICES	RESPONSES	
1-3	20.00%	1
4-6	0.00%	0
7-9	0.00%	0
10+	80.00%	4
TOTAL		5

Q13 Are you an ATD Tulsa member?

Answered: 5   Skipped: 0
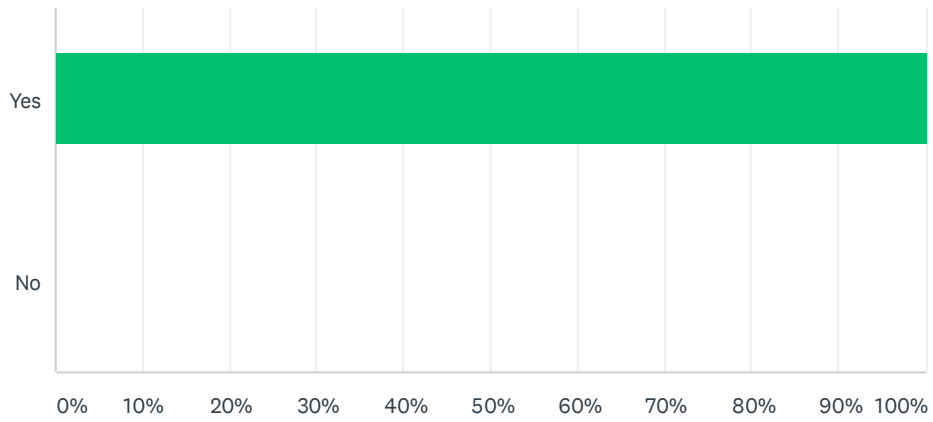
ANSWER CHOICES	RESPONSES	
Yes	100.00%	5
No	0.00%	0
TOTAL		5