



**Minutes for Board Meeting
November 2, 2018**

Date & Time: Friday, November 2, 2018 from 12 PM to 1:30 PM
Location: Kendall-Whittier Library – Meeting Room, 21 S Lewis Ave, Tulsa, OK 74104
Note: Food and Drinks Allowed.

Call Meeting to Order

- Meeting called to order by Linda Jenkins at 12:03 pm

Roll Call

- Roll Call performed by Michael Chancey
- Board members in attendance:
 - Linda Jenkins, President
 - Walt Hansmann, President-Elect
 - Lorinda Schrammel, Immediate Past President
 - Michael Chancey, VP Administration
 - Skip Eller, VP Finance
 - Stacy Davis, VP Programming
 - Cathy Fox, VP Accommodations
 - Shelby Morris, VP Marketing
- Board members not in attendance:
 - Ashley Whitfield, VP Membership (excused absence)
- Guests in attendance:
 - Kim Boggs, incoming VP Marketing
- Michael Chancey declared quorum present

Agenda for November 2, 2018 Board Meeting

- Motion to approve agenda for November 2, 2018 Board Meeting – Fox moves; Morris second;
MOTION CARRIED

Administrative

- Minutes from August 3, 2018 Board Meeting
 - Motion to approve – Eller moves; Davis second; **MOTION CARRIED**
- Minutes from October 5, 2018 Meeting
 - Motion to approve – Eller moves; Davis second; **MOTION CARRIED**
- Bylaws and Policies Committee
 - Jenkins, Hansmann and Chancey to meet before next board meeting to review any proposed changes
- Definition of Excused and Unexcused Absences from Board Meetings
 - Motion to accept definition – Eller moves; Fox seconds; **MOTION CARRIED**
- Board Email Destruction & Retention Policy identified as next policy to be reviewed
- Annual Risk Assessment
 - Jenkins, Hansmann and Chancey to complete before December board meeting
- 2018 ALC Takeaways for 2019

- Great discussions and takeaways on Wild Apricot application and success; sharing and learning from the Houston Chapter
- Hansmann and Jenkins presented on chapter leadership from election to inauguration through first 90 days as well as chapter meeting processes
- Schrammel will be National Chapter Advisor for the Ohio Chapters
- Jenkins being interviewed for ATD Chapter Leaders Conference Program Advisory Committee (ALC PAC) with interview on November 12

Financial

- Financial Reports for October 2018 presented by Eller
 - Motion to accept reports – Morris moves; Hansmann second; **MOTION CARRIED**
 - Eller tenders resignation of VP Finance position pending replacement
 - Recommendation to replace with new VP Finance or to outsource the financial responsibilities of the chapter
 - Resignation date to be determined.
 - Jenkins and Hansmann are researching options
- Meeting Space for 2019
 - OSU Tulsa is increasing the room rate for 2019 to \$105.00 per month
 - Send any room recommendations to Fox and she will investigate options

Membership

- Membership Reports for October 2018
 - Report on New Member Luncheon on October 30, 2018
 - Whitfield and Jenkins in attendance
 - No new members attended
 - Notes for VP Membership
 - Jeri Phillips is no longer with Matrix – no notice of where she has moved to.
 - Emily Avants has been promoted to HR Director – likely will not be able to renew.
- Annual Membership Survey Results (CARE Element 3.1)
 - Takeaways from Survey results for 2019 chapter planning and activities
 - Plans to share Survey results with chapter members –
 - Survey results have been posted on Chapter website under chapter documents
 - Include summary on the bottom of announcements for Trainer Throwdown participants
 - Morris to send out email notice to members of Annual Membership Survey Results
- Student Member Recruitment Packets Being Provided by ATD

Professional Development

- Program Meeting Survey Results – October 12, 2018
 - Davis to email results to board
- Level 1 Gamification Certification Workshop on September 28, 2018
 - Follow Up with James Clark re ½ registration

- Eller to send reimbursement
 - Participant Survey Results
 - Programming Scheduled – November 9, 2018 - Content & Logistics:
 - Program Speaker: Strategic Thinking with Kris Reynolds
 - Accommodations: Cathy Fox
 - Board Member Attendance & Participation – Jenkins, Davis, Fox, Morris, Eller, Schrammel, Chancey
 - Board Communications for Attendees:
 - Check In to Program Meeting on Facebook and Twitter – Linda Jenkins
 - Welcome Guests – Linda Jenkins
 - Acknowledge New Members and Power Members and Power Member Minute (TBD) – Linda Jenkins
 - Sponsor Pitch for 2019 Programs – Walt Hansmann
 - Pitch for Future Programs – Stacy Davis
 - November 13th – State ATD Conference by COC-ATD
 - November 15th – Networking Event at Schnake Turnbo Frank
 - December 7th (Note: 1st Friday of the Month at Ti Amo South – Trainer Throwdown
 - Davis to mention Shout-Outs for members who have contributed to the chapter in 2018.
 - Program — Strategic Thinking with Kris Reynolds - Stacy Davis
 - At end of Program:
 - Guest Presenter Thank You – Stacy Davis
 - Door Prizes – Stacy Davis & Linda Jenkins
 - Post Meeting Evaluation Online Distribution by November 14, 2018
 - Networking Event at Schnake Turnbo Frank on November 15, 2018
 - Morris to send out email
 - Board members encouraged to share/like events on social media sites
 - Program Meeting on December 7th – Trainer Throw Down
 - Plans to Recruit/Solicit trainers to participate in Throw Down
 - No 4th quarter eLearning SIG for 2018
 - Next event in January 2019

Communications

- Communications Needs & Opportunities
 - Procedures to Submit Application to Participate in Employee Learning Week with Trainer Throw Down on December 7th
 - Plans to Promote/Inform re 1st Friday, December 7th and Ti Amo South Location for December Program Meeting

Old Business

- No old business presented

New Business

- No new business presented

Confirm Date for Next Board Meeting

- Jenkins looking at dates, likely December 11 or 12
- Jenkins to notify board of date and location

Adjourn Meeting

- Meeting adjourned by Jenkins at 1:42 pm



Agenda

Date & Time: Friday, November 2, 2018 from 12 PM to 1:30 PM

Location: Kendall-Whittier Library – Meeting Room, 21 S Lewis Ave, Tulsa, OK 74104

Note: Food and Drinks Allowed.

1. Call Meeting to Order
 - a. Roll Call – Michael Chancey
 - i. Ashley Whitfield will not be able to attend
 - b. Confirm Quorum – Declare if Quorum is or is not Present – Michael Chancey
 - c. Agenda for November 2, 2018 Board Meeting – **Review and Approve** – Linda Jenkins
2. Administrative
 - a. Minutes from August 3, 2018 Board Meeting – **(attached) Review and Approve** – Linda Jenkins
 - b. Minutes from October 5, 2018 Meeting **(attached)** – **Review and Approve** – Linda Jenkins
 - c. Bylaws and Policies Committee - Linda Jenkins & Walt Hansmann
 - a. Definition of Excused and Unexcused Absences from Board Meetings **(attached)**
 - b. Board Email Destruction & Retention Policy
 - d. Plans to Conduct Annual Risk Assessment – Linda Jenkins
 - e. 2018 ALC Takeaways for 2019 – Walt Hansmann
 - f. ATD Chapter Leaders Conference Program Advisory Committee (ALC PAC) – Linda Jenkins
3. Financial
 - a. Financial Reports for October 2018 – **Review and Accept** – Skip Eller
4. Membership
 - a. Membership Reports for October 2018 **(attached)** – **Review & Accept** – Linda Jenkins
 1. Report on New Member Luncheon on October 30, 2018
 2. Plans for outreach to renewing members
 - b. Annual Membership Survey Results (CARE Element 3.1) **(attached)** – **Review & Accept** – Linda Jenkins
 1. Takeaways from Survey results for 2019 chapter planning and activities
 2. Plans to share Survey results with chapter members –
 - i. Survey results have been posted on Chapter website under chapter documents
 - ii. Include summary on the bottom of announcements for Trainer Throwdown participants
 - c. Student Member Recruitment Packets Being Provided by ATD – Linda Jenkins
5. Professional Development
 - a. Program Meeting Survey Results – October 12, 2018 – Stacy Davis
 - b. Level 1 Gamification Certification Workshop on September 28, 2018 – *Stacy Davis*
 - a. Follow Up with James Clark re ½ registration

- b. Participant Survey Results – (attached) – Discuss opportunities for improvement and options for future Gamification workshops
 - c. Programming Scheduled – November 9, 2018 - Content & Logistics:
 - i. Program Speaker: Strategic Thinking with Kris Reynolds
 - ii. Accommodations: Cathy Fox
 - 1. Meal
 - 2. Check In
 - iii. Board Member Attendance & Participation – Linda Jenkins, Stacy Davis & Cathy Fox
 - iv. Board Communications for Attendees:
 - 1. Check In to Program Meeting on Facebook and Twitter – Linda Jenkins
 - 2. Welcome Guests – Linda Jenkins
 - 3. Acknowledge New Members and Power Members and Power Member Minute (TBD) – Linda Jenkins
 - 4. Sponsor Pitch for 2019 Programs – Walt Hansmann
 - 5. Pitch for Future Programs – Stacy Davis
 - a. November 13th – State ATD Conference by COC-ATD
 - b. November 15th – Networking Event at Schnake Turnbo Frank
 - c. December 7th (Note: 1st Friday of the Month at Ti Amo South – Trainer Throwdown
 - v. Program – Strategic Thinking with Kris Reynolds - Stacy Davis
 - vi. At end of Program:
 - 1. Guest Presenter Thank You – Stacy Davis
 - 2. Door Prizes – Stacy Davis & Linda Jenkins
 - vii. Post Meeting Evaluation Online Distribution by November 14, 2018
 - d. Networking Event at Schnake Turnbo Frank on November 15, 2018 – Stacy Davis
 - e. Program Meeting on December 7th – Trainer Throw Down – Stacy Davis
 - i. Plans to Recruit/Solicit trainers to participate in Throw Down
 - f. Date/Location – 4th Quarter eLearning SIG – Shelby Morris
6. Communications
- a. Communications Needs & Opportunities – Shelby Morris
 - i. Procedures to Submit Application to Participate in Employee Learning Week with Trainer Throw Down on December 7th
 - ii. Plans to Promote/Inform re 1st Friday, December 7th and Ti Amo South Location for December Program Meeting
 - iii. Content for December 17th - 4th Quarter Newsletter
7. Old Business
8. New Business
9. Confirm Action Items

10. Confirm Date for Next Board Meeting: Since Program Meeting is on 1st Friday in December, need to determine date/time/location for final 2018 board meeting

11. Adjourn Meeting – Linda Jenkins



**Minutes for Board Meeting
August 3, 2018**

Date & Time: Friday, August 3, 2018 from 12:00 PM to 1:30 PM

Location: Roka Restaurant, 1616 S. Utica Ave., Tulsa, OK 74104

1. Call Meeting to Order Linda at 12:05 p.m.
 - a. Roll Call – Jeremy Smith
 - Present:**
 - Linda
 - Shelby
 - Lorinda
 - Walt
 - Cathy
 - Jeremy
 - Stacy
 - Skip

 - Excused Absence:**
 - Ashley
 - b. Confirm Quorum – Declare if Quorum is or is not Present – Jeremy Smith
 - i. 6 of 9 board members present at time of roll call (Skip arrived 12:08). A quorum was established.
 - c. Agenda for August 3, 2018 Board Meeting – Review and Approve – Linda Jenkins
 - i. Moved by Stacy, Shelby second. MOTION CARRIES

2. Administrative
 - a. Minutes from July 6, 2018 Board Meeting – Review and Approve – Jeremy Smith
 - i. Moved by Walt, second by Cathy. MOTION CARRIES
 - b. Update from Bylaws and Policies Committee meeting on July 18, 2018 – Jeremy Smith
 - i. 3 Policies for the Sept board meeting
 - ii. Aug 15 date of next meeting
 - c. Plans to Conduct Annual Risk Assessment – Jeremy Smith
 - i. Jeremy will be reaching out to each VP for input
 - d. Request from ATD to Participate in ATD Member Week (Sept. 10 – 14) with 10% Discount Off Chapter Membership Rates (attached) – Review and Approve – Linda Jenkins
 - i. Ashley could promote this to get memberships done during that week
 - ii. *Motion to approve participation in ATD Member Week by aligning a 10% discount on chapter memberships from September 10 – 14, 2018 by Skip. Lorinda second. MOTION CARRIES.*
 - iii. *Second motion by Skip – offer a 10% discount on ATD Tulsa Only Chapter Memberships in alignment with ATD Member Week from September 10 – 14, 2018. Walt second. MOTION CARRIES*
 - e. Elections Process – Linda Jenkins
 1. We received seven completed nomination packets for six of the seven 2019 Board positions. The nomination packets are for the following positions: President-Elect – 2

(Lewana Harris & Jeremy Smith); VP of Administration – 1 (Michael Chancey); VP of Finance – 1 (Skip Eller); VP of Marketing – 1 (Kim Boggs); VP of Membership – 1 (Ashley Whitfield); and VP of Programming – 1 (Stacy Davis). We did not receive a nomination packet for VP of Accommodations. The Elections Committee reviewed each nomination packet and certified each nominee as eligible to run for office.

2. The candidate information has been posted on the ATD Tulsa website and notification was sent to members via email.
 3. Since we have two candidates for President-Elect, each will have an opportunity to give a two-minute presentation in-person or have his/her two-minute video played during the August 10, 2018 Program Meeting. To promote equal access for all chapter members, presentations will be recorded by ATD Tulsa and posted, along with videos shown, on the ATD Tulsa website following the meeting. Clarified that even if you've posted a video online, you can present in person at the meeting and have the recorded presentation posted online.
 4. Elections will occur electronically (online) from Friday, August 10, 2018 until Friday, August 17, 2018 at 11:59 PM (8 days). As Elections Committee Secretary, Linda Jenkins will prepare the ballots along with the bylaws changes for member approval in SurveyMonkey. Since each member needs to receive a unique link for voting, the ballots and bylaws changes will be sent via email via SurveyMonkey not via Wild Apricot at 8 AM on Friday, August 10, 2018.
 5. Chair of the Credentials Committee will provide the member names and emails to Linda Jenkins.
- f. Credentials Committee – Review and Approve - Linda Jenkins
The following chapter members are recommended to serve on the Credentials Committee:
1. Walt Hansmann – Chair
 2. David Wagner
 3. Greg Kittinger
 - i. Motion to approve, moved by Skip, second by Lorinda. MOTION CARRIES
 - ii. Credentials Committee will have a Zoom meeting Monday to go through report to approve members to receive ballots. Once approved, Walt will send list to Linda. Note: Although two current members have opted-out from receiving emails from the chapter, they will be sent the email to vote in the elections.
- g. Update on Integration of ATD Tulsa website to the ATD International Store – Walt Hansmann, Shelby Morris & Ashley Whitfield
We need to continue to communicate to the members that power memberships go through the ATD store and links from our website. This is for Tulsa Chapter memberships as well as International memberships. Effective methods identified for this communication:
- i. Quarterly newsletter
 - ii. auto-renewal emails
 - iii. ATD has a pilot program with D.C. chapter to integrate databases. If go to ATD store for chapter meeting, ATD sends spreadsheet to import into Wild Apricot. New way

would be to have ATD automatically integrate into our Wild Apricot. This would help to cause less manual work. Board believes we should allow this to happen.

3. Financial

- a. Financial Reports as of July 31, 2018 – Review and Accept – Skip Eller

4. Membership

- a. Membership Reports for July 2018 as of August 1, 2018 (attached) – Review & Accept – Ashley Whitfield
1. **On July 23, 2018, ATD Tulsa reached 51% Power Membership. Since we have exceeded our Power membership requirement by 15% or more (51% - 35% = 16%), we have achieved Superstar Status for 2018! Way to go!!**
 2. Quarterly New Member Luncheon held on July 19, 2018
 3. Ashley to look at Steven Oliver. May be using a different email address. He is not a new member, he is a renewal.
- b. Membership Activity Scheduled for August 2018: Annual Membership Survey – Draft Questions for Annual Membership Survey as of 7-30-18 (attached) – Review and Approve - Ashley Whitfield
1. Wordsmith some of the questions to make it a bit more clear
 2. Add programming question (special programming/workshop time of day/day of week/1/2 day vs. full day).
 3. Motion by Skip, Walt second approval of questions with wordsmithing done.
MOTION CARRIES

5. Professional Development

- a. Date/Plans for Third Quarter eLearning SIG at BOK Financial - Jeremy Smith
- b. July 13, 2018 Program Survey Results (attached) - Review & Discuss Opportunities for Improvement – Stacy Davis
- c. Leading From Where You Are: How Every Person Can Help Or Hinder A Collaborative Culture on July 27th - Review & Discuss Opportunities for Improvement – Stacy Davis
- d. Programming Scheduled – August 10, 2018 - Content & Logistics:
- i. Program Speaker: Pre-Workshop Introduction: Gamification for Talent Development - Deconstructing the Psychology of Games to Entice, Engage, & Encourage Learners with Tammy Ball, Consultant, Sententia Games
 - ii. Accommodations: Meal & Check In – Cathy Fox
 - iii. Board Member Attendance & Participation – Lorinda Schrammel, Walt Hansmann and Linda Jenkins (must leave at 12:15 PM)
 - iv. Board Communications for Attendees:
 1. Check In to Program Meeting on Facebook and Twitter – Linda Jenkins
 2. Welcome Guests – Linda Jenkins
 3. Acknowledge New Members and Power Members (and Power Member Minute) – Linda Jenkins

4. Acknowledge Board Members and Announce Elections with 2-minute speech and video from President-Elect candidates – Lewana Harris & Jeremy Smith
 5. At end of Program:
 - a. Guest Presenter Thank You’s – Stacy Davis
 - b. Pitch for September Gamification Workshop – Stacy Davis
 - c. Door Prizes – Stacy Davis & Walt Hansmann
 - v. Post Meeting Evaluation Online Distribution by August 14, 2018
 - e. Networking Events:
 - i. Logistics for November evening event at Schnake Turnbo Frank: Public Relations and Leadership Development hosted by David Wagner
 - f. Level 1 Gamification Certification on September 28, 2018:
 - a. Agreement signed on June 14, 2018. Per agreement:
 - i. Min. 12 participants – max 45 (3 registered as of 7-27-18)
 - ii. Payment of 50% revenue share is due on September 28, 2018
 - iii. Workshop may be cancelled on or before September 7 with no penalty - \$500 penalty after Sept. 7
 - iv. Sententia provides 1 free registration for an ATD Chapter member – *Note: We can create 1 free registration or 1 half price registration.*
 - b. Location for workshop is OSU Tulsa
 - c. Marketing strategy for workshop?
 - i. Announce at August Chapter meeting
 - ii. Send email just about this workshop
 - iii. Send email to ATD Oklahoma members list
6. Communications
 - a. Communications Needs & Opportunities – Shelby Morris
 - i. Flyers to promote Monthly Program meetings and workshop
 - ii. Send communications to ATD members in Oklahoma promoting workshops
 7. Old Business
 8. New Business
 9. Confirm Action Items
 - a. Need to clarify in Elections process policy that if you post a video, you can still present in person at the meeting when elections are being held. Will add this to agenda for bylaws and policy committee meeting in August.
 - b. Ashley to place in the auto-renewal emails as well.
 - c. Ashley to look at Steven Oliver. May be using a different email address. He is not a new member, he is a renewal.
 - d. Shelby to share her schedule of communications so that we can be cognizant of not sending out too many messages at once.

- e. Shelby to create communication schedule for the Gamification workshop
- f. Skip to follow up with Krysten Saint
- g. Shelby to send flyer to Stacy

10. Confirm Date for Next Board Meeting: Friday, September 7, 2018 at 12 PM at Roka – Linda Jenkins

11. Adjourn Meeting – Linda Jenkins at 1:52 p.m.



Definition of Excused and Unexcused Absences from Board Meetings

Policy 5.2 Definition of Excused and Unexcused Absences from Board Meetings

This policy defines excused and unexcused absences for board members for the board meetings.

1. An excused absence is defined as notification, to the presiding officer of the meeting, of the inability to attend a board meeting prior to the meeting being called to order.
2. An unexcused absence is defined as no notification of inability to attend a board meeting, to the presiding officer of the meeting, prior to the meeting being called to order.



Financial Reports

Association for Talent Development Tulsa Chapter

2018 Budget/Income Statement (As of 11/01/2018)

Category Description	2017 Actuals	2018 Budget	10/01/18 - 10/31/18	2018 Year To Date	VARIANCE	Special Notes	FY18 Notes
INCOME							
ATD CHIP	1,158.31	987.70	0.00	353.10	-634.60		Variable - Using 2 year Average
Meeting Fees	7,299.00	9,617.14	700.00	5,220.00	-4,397.14	\$390 for August Meeting, \$60 for September	12 Meetings (see Meeting Income Worksheet)
Membership Dues	4,249.00	5,900.00	200.00	3,138.14	-2,761.86	\$125 Received from Corporate	115 @ \$50 standard memberships; 6 @ \$25 student
ATD Meeting Sponsorship	0.00	1,750.00	0.00	1,000.00	-750.00		7 Regular Meeting Sponsorships (\$250 each)
Special Event - Training	924.00	3,000.00	0.00	5,840.00	2,840.00	All for Gamification Workshop	One Special Event - Tentative (20 participants @ \$49 each)
Special Event - State Conference	11,882.00	0.00	0.00	0.00	0.00	2017: State Conference + Approachable Leadership	NO CONFERENCE
TOTAL INCOME	33,762.31	21,254.84	900.00	15,551.24			
EXPENSES							
Board Expense							
National ATD Dues	2,235.00	1,611.00	0.00	1,341.00	270.00		9 @ \$179: Gentleperson's agreement to pay ATD dues for board members
Retreat	0.00	250.00	0.00	53.05	196.95		Printing, Lunch for Jan. 20, 2018 board retreat
							1 Registrations, 3 Hotel Rooms, 3 Airfares, & Meals - Note: Linda and Walt are planning to submit proposals to present workshops at ALC. Presenters receive free registration to ALC (\$150 each). If their proposals are accepted, propose to send them + 1 additional board member to ALC.
ATD Leader's Conference	1,985.55	2,700.00	0.00	1,300.30	1,399.70	1 Registration (pre-paid for President Elect), Travel for Lewana	
Treasurer Expense	48.25	441.00	0.00	347.70	93.30	Stamps, Certified Delivery to Greg Robinson	Stamps / Envelopes (\$75), QuickBooks Subscription (\$366)
Annual Audit	0.00	1,000.00	0.00	0.00	1,000.00		Annual Financial Audit
TOTAL Board Expense	4,268.80	6,002.00	0.00	3,042.05			
Communications Expense							
GoDaddy Domains	99.00	81.02	0.00	80.68	0.34		Web Domains (Annual Expense)
Go Daddy Standard SSL	0.00	0.00	0.00	0.00	0.00		Next Due 03/17/19 (\$140)
Go Daddy Email	207.27	501.48	0.00	501.48	0.00		New Email Purchase (\$501.48 renew 2018, 2021; \$120 renew 2020)
Wild Apricot Web Site	578.63	1,248.00	0.00	1,536.00	-288.00		Annual Expense - Next Due 04/27/18
Survey Monkey	0.00	425.00	0.00	408.00	17.00		Approved expense up to \$425.00 (annual)
PO Box Subscription	0.00	64.00	0.00	70.00	-6.00		Annual Expense - Next Due 02/18
Marketing	0.00	250.00	0.00	0.00	250.00		Printing / Mailing Costs for Special Meeting or Communcation
TOTAL Communications Expense	884.90	2,569.50	0.00	2,596.16			
Meeting Expense							
Facility Charge	810.00	870.00	0.00	845.00	25.00		10 @ \$70 (OSU in Room 140); 2 @ 85 (OSU in BS Roberts Room)
Meals-Food	6,760.18	7,368.00	426.76	4,805.66	2,562.34	\$530 rec'd - \$70 room - \$426.76 Catering by Or = \$33.24	384 (32 attend/month avg.) @ \$17/month average (+20 attend for special event + \$500)
ATD December Special Program			0.00	0.00	0.00		Moved to Recognition Items
Recognition Items	0.00	850.00	0.00	78.20	771.80		See separate "Recognition Items Budget" tab for breakdown
TOTAL Meeting Expense	7,570.18	9,088.00	426.76	5,728.86			
Membership Expense							
New Member Marketing	0.00	450.00	0.00	0.00	450.00		New Member Welcome Kits
New Member Appreciation	0.00	660.00	0.00	158.60	501.40		(40@16.50) New Member Lunches
TOTAL Membership Expense	0.00	1,110.00					
Misc. Expenses							
Paypal Expense	794.96	400.00	37.42	450.53	-50.53		High in 2017 due to conference
Oklahoma ATD State Conference	21,010.97	1,000.00	0.00	1,000.00	0.00	In-kind Sponsorship of State Conference	In-Kind Sponsorship to OKC State Conference Note: Gentleperson's agreement to provide host chapter with \$1,000 "sponsorship" check
Other Special Event Expense	0.00	0.00	0.00	1,114.48	-1,114.48		Moved to "Recognition Items" under "Meeting Expense" above
Insurance	960.12	1,000.00	0.00	992.55	7.45		Due March (Note: In 2017 paid: \$460.12 to Willis of MD, and \$500 to Hartford)
Scholarship Program (pending approval)	0.00	0.00	0.00	0.00	0.00		Scholarship Program pending policy approval
TOTAL Misc Expense	22,766.05	2,400.00	37.42	3,557.56			
TOTAL EXPENSES	35,489.93	21,169.50	464.18	14,924.63			
OVERALL TOTAL	-1,727.62	85.34	435.82	626.61			

Paypal Fees as of 06/01/17: 2.2% + .30 for online transactions. 2.7% per card swipe, 3.5% + .15 for manual key

**ATD Tulsa Chapter
Statement of Financial Position as of 11/01/2018**

Assets		Liabilities	
Checking	\$ 15,548.28	Accounts Payable	\$ -
PayPal	\$ 2,000.26	Taxes Payable	\$ -
Cash	\$ 373.30	Total Liabilities	<u>\$ -</u>
Accounts Receivable	\$ 2,073.00	Net Assets	
(Less doubtful accounts)*	\$ (45.00)	Unrestricted Net Assets	\$ 19,949.84
		Temporarily Restricted Net Assets	\$ -
		Permanently Restricted Net Assets	\$ -
Total Cash Assets	<u>\$ 17,921.84</u>	Total Net Assets	<u>\$ 19,949.84</u>
Total Assets	<u>\$ 19,949.84</u>	Total Liabilities Plus Net Assets	<u>\$ 19,949.84</u>

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



Membership Report

ATD Tulsa VP of Membership Report for Board Meeting 11/2/18

New Member Lunch – Held 10/30. 0 new members attended. Sent a Doodle invite but got little input. Next year will plan to schedule even more in advance and announce in chapter meetings in addition to sending the invite.

Summary of Memberships as of 10/31/18

Membership Type	Number of Members
Student	2
Members	91
	Total = 91
Power Members (as of 9/30/18)	47 members 52%
Chapter Members	members

Members Joined in October 2018

Renewal Date	First Name	Last Name	Company	Email	Member Type
10/10/18	Olivia	Williams	NueHealth	fwilliams@nuehealth.com	Chapter
10/5/18	Sarah	Coccaro	Avis Budget Group	sarah.coccaro@icloud.com	Chapter

Members Renewed Since October 2018

Renewal Date	First Name	Last Name	Company	Email	Member Type
October 13, 2019	Jill	Dickerson	State National Companies	jdickerson@statenational.com	Power Member
October 31, 2019	Kristin	Wise	Explorer Pipeline	kwise@expl.com	Power Member

Members DID NOT Renew as of October 31, 2018

Renewal Date	First Name	Last Name	Company	Email	Member Type
10/10/18	Jamie	Westfall	Henry Schein Practice Solutions	jamie.westfall@henryschein.com	Chapter
10/19/18	Joshua	Etheridge	The Coffee Bunker	joshua@coffeebunker.org	Chapter
10/24/18	Jesse	Hopkins	Radiator Depot	hopkinsjlee@gmail.com	Power DUE 8/31/18

ATD Tulsa VP of Membership Report for Board Meeting 11/2/18

Lapsed Membership and Follow Up is Needed

First Name	Last Name	Company	Who Owns Follow Up	Status of Follow Up
Kristen	Saint	Tulsa Federal Credit Union	Ashley	Emailed 10/31
Emily	Avants	Mill Creek Lumber & Supply	Ashley	Emailed 10/31
Matthew	Walker	TTCU Federal Credit Union	Ashley	Emailed 10/31
Kristal	Nicholson	OU National Resource Center for Youth Services	Ashley	Emailed 10/31
Jeri	Phillips	Matrix Service Company	Ashley	Emailed 10/31
Joshua	Etheridge	The Coffee Bunker	Ashley	Emailed 10/31
Jesse	Hopkins	Radiator Depot	Ashley	Emailed 10/31

Members Due for Renewal November 2018

Renewal Date	First Name	Last Name	Company	Email	Member Type
11/3/18	Mark	Plank	Hilti. Inc	mark.plank@hilti.com	Chapter
11/7/18	Vivian	Phillips	Cherokee Nation Businesses	vivian.phillips@cn-bus.com	Power Due 3/31/19
11/8/18	Kara	Schatz	BOKF	kschatz@bokf.com	Power Due 2/28/19
11/11/18	Josh	Miller	The Persimmon Group	joshmiller@thepersimmongroup.com	Chapter
11/15/18	Lance	Thompson	O.C. Tanner	lance.thompson@octanner.com	Chapter

Members Due for Renewal December 2018

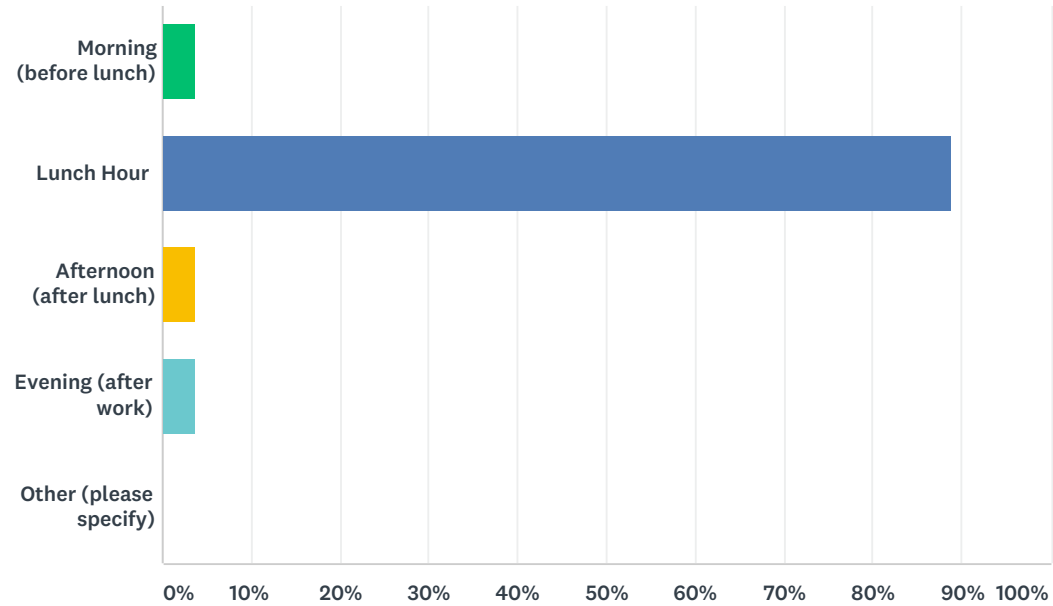
Renewal Date	First Name	Last Name	Company	Email	Member Type
December 01, 2018	Kaylen	Wood	O.C. Tanner	kaylen.wood@octanner.com	Chapter
December 04, 2018	Angela	Strode	NORDAM	astrode@nordam.com	Chapter
December 06, 2018	Andria	Tipler	Bank Of Oklahoma Financial	atipler@bokf.com	Power Member Due 11/30/18
December 18, 2018	Stephen	Gunn	GEB America/ Kepano Consulting	stephen.gunn@me.com	Chapter



2018 Annual Membership Survey

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

Answered: 27 Skipped: 0

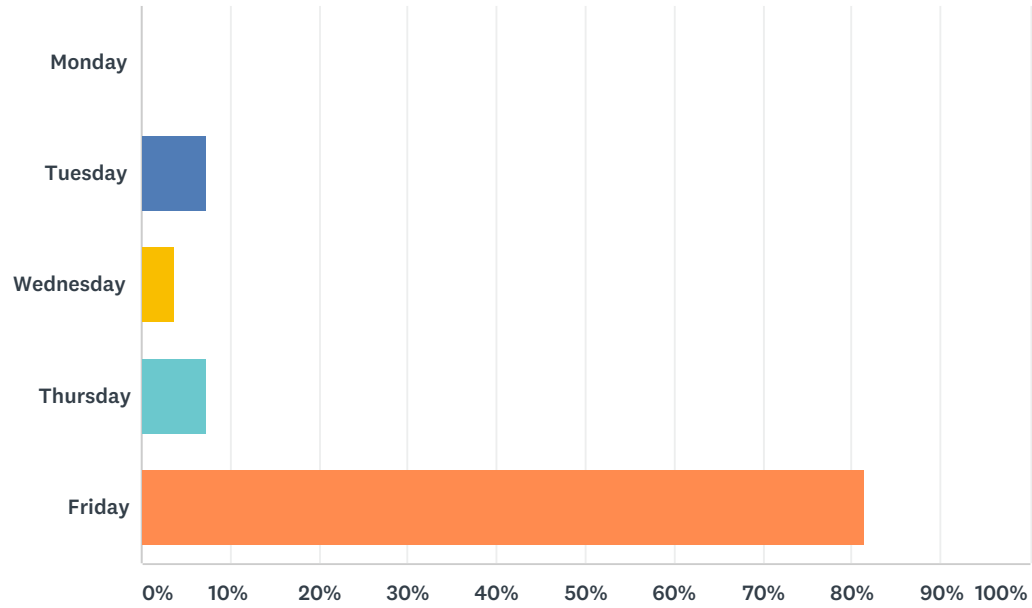


ANSWER CHOICES	RESPONSES	
Morning (before lunch)	3.70%	1
Lunch Hour	88.89%	24
Afternoon (after lunch)	3.70%	1
Evening (after work)	3.70%	1
Other (please specify)	0.00%	0
TOTAL		27

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

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

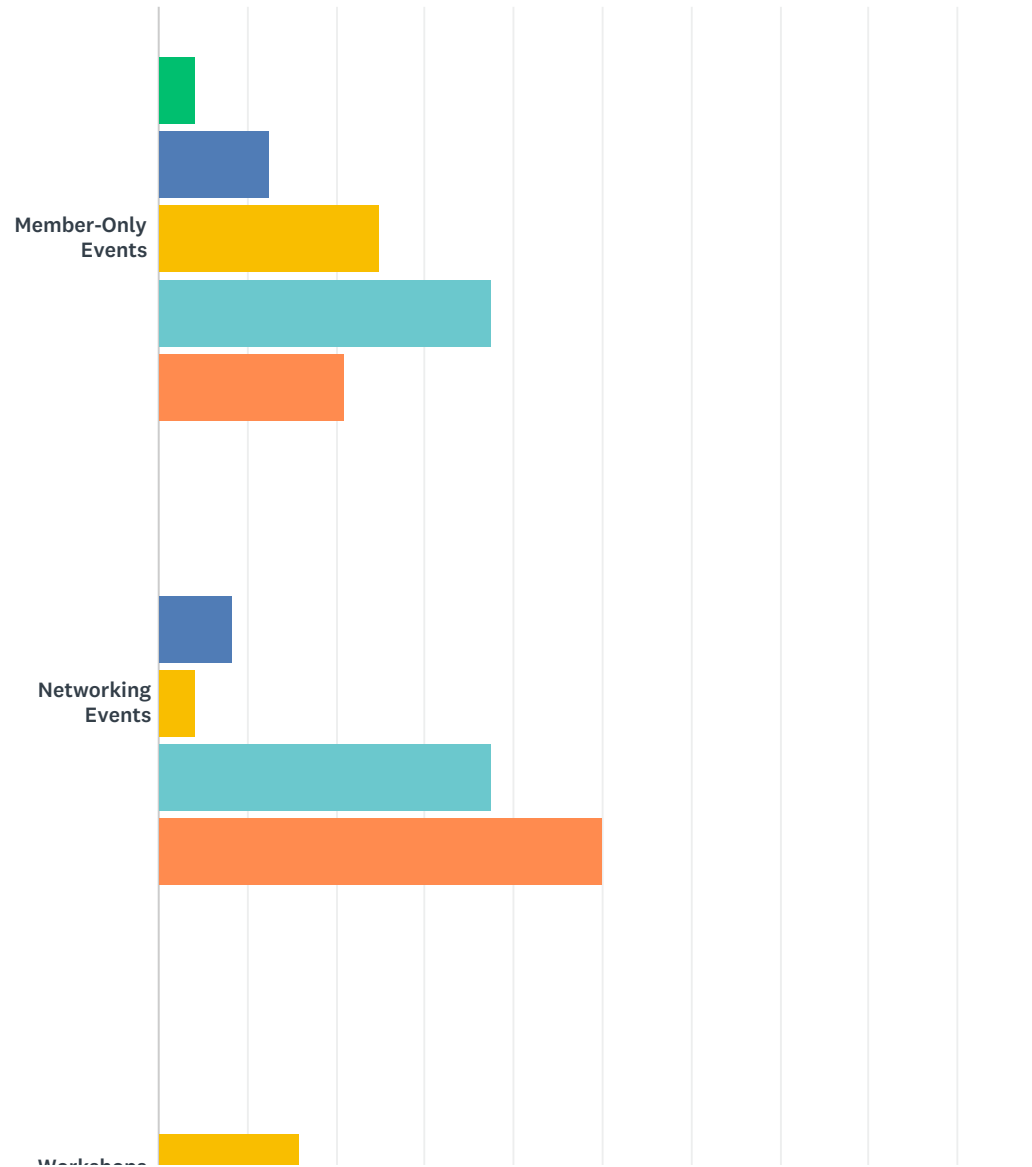
Answered: 27 Skipped: 0



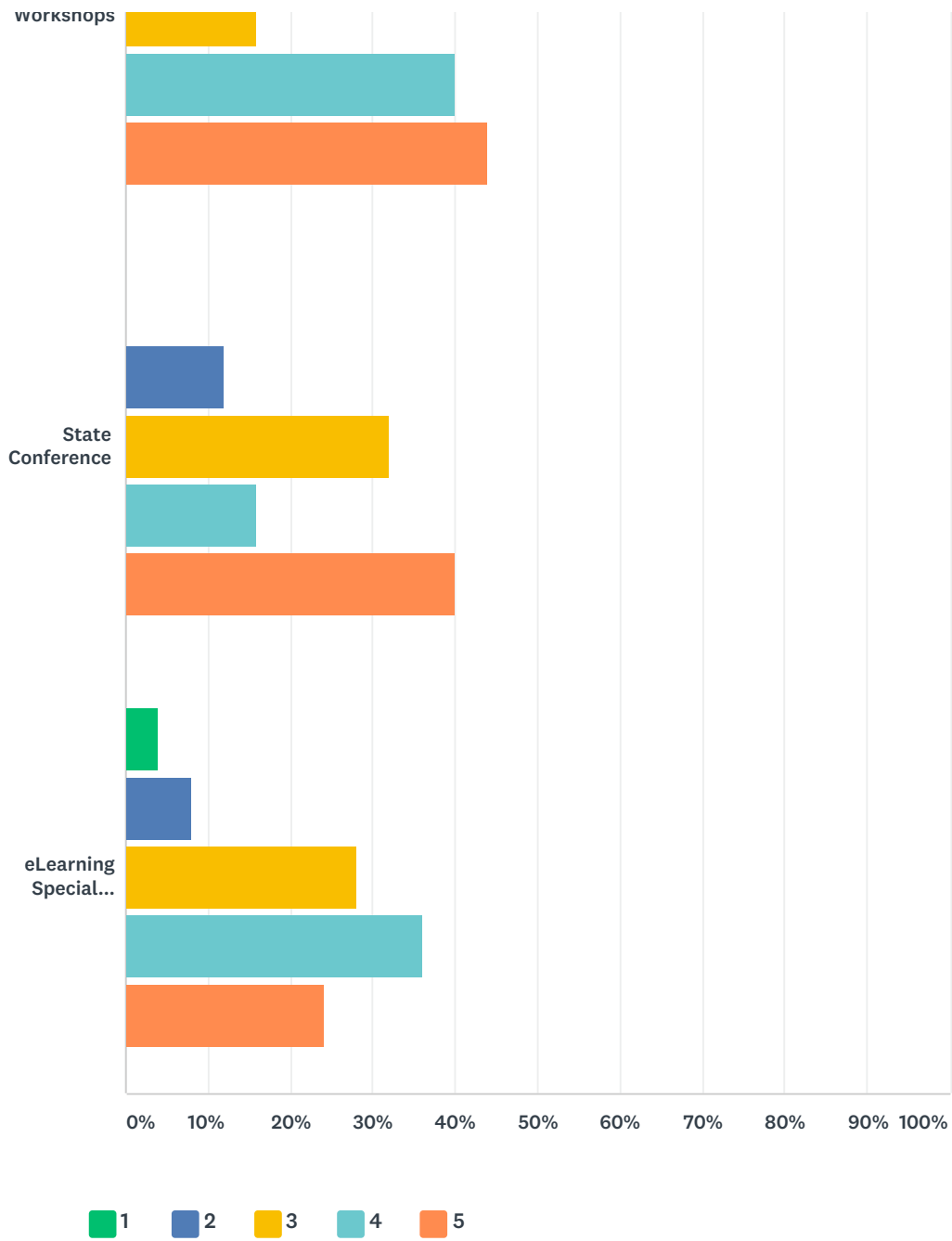
ANSWER CHOICES	RESPONSES
Monday	0.00% 0
Tuesday	7.41% 2
Wednesday	3.70% 1
Thursday	7.41% 2
Friday	81.48% 22
TOTAL	27

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

Answered: 26 Skipped: 1



ATD Tulsa Annual Membership Survey 2018



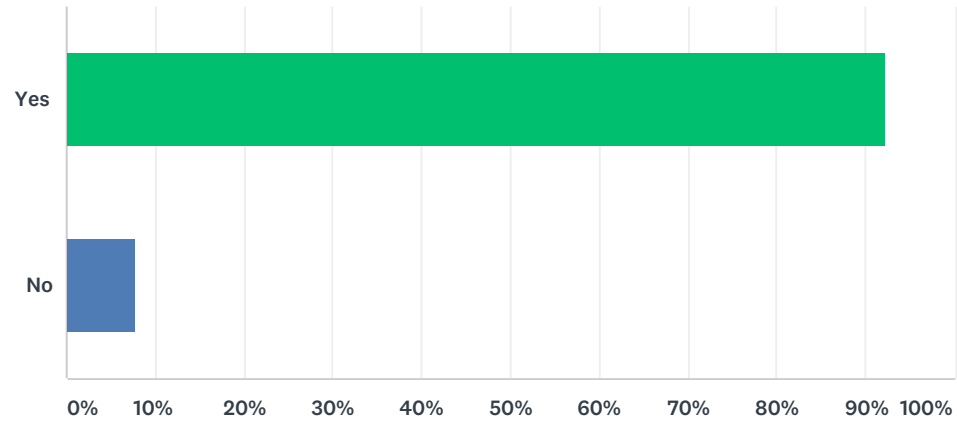
	1	2	3	4	5	TOTAL
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ATD Tulsa Annual Membership Survey 2018

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

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

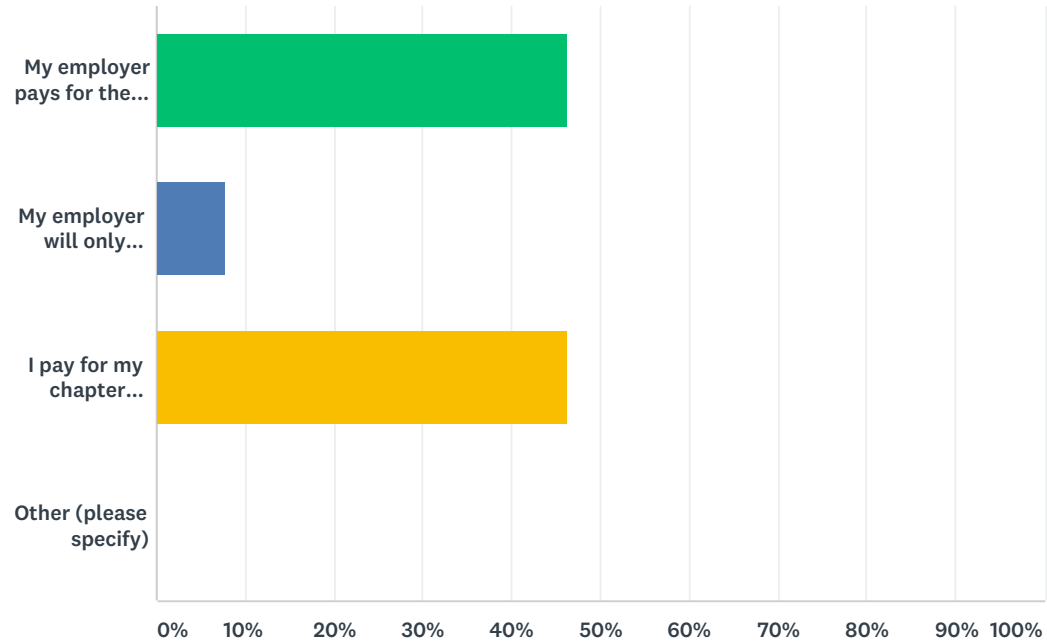
Answered: 26 Skipped: 1



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

Q5 Who pays for your ATD Tulsa Chapter membership?

Answered: 26 Skipped: 1

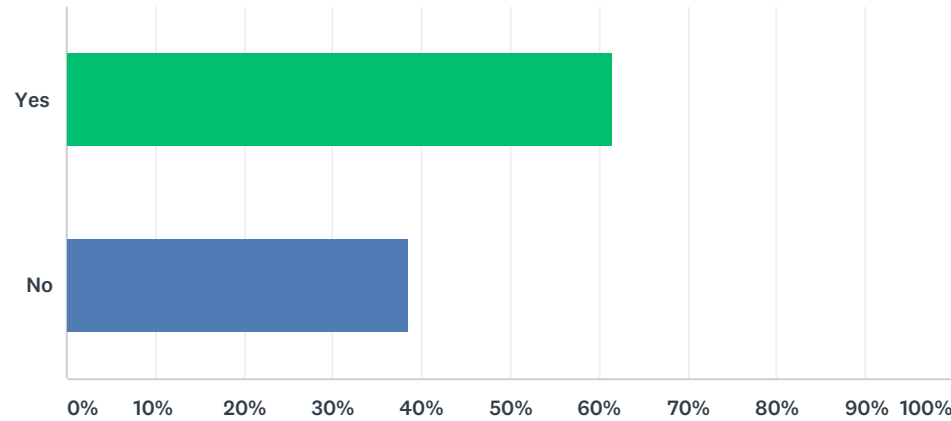


ANSWER CHOICES	RESPONSES
My employer pays for the membership on my behalf.	46.15% 12
My employer will only reimburse me after I pay for the membership myself.	7.69% 2
I pay for my chapter membership myself from personal funds.	46.15% 12
Other (please specify)	0.00% 0
TOTAL	26

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

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

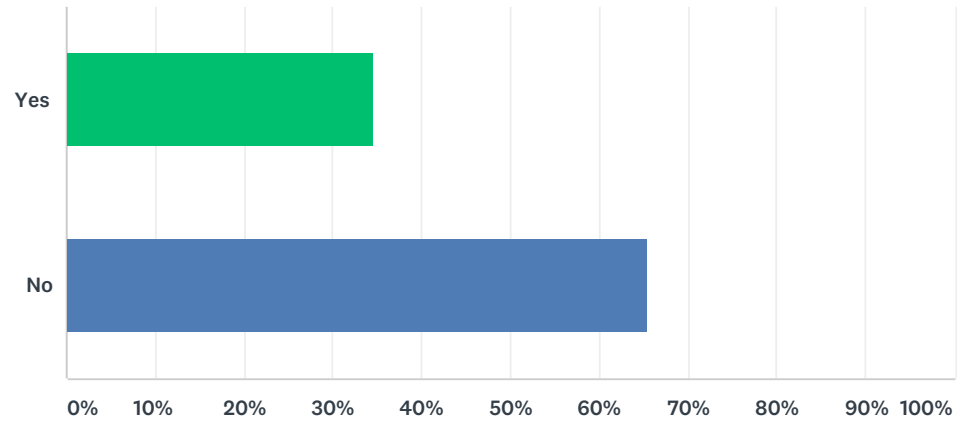
Answered: 26 Skipped: 1



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

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

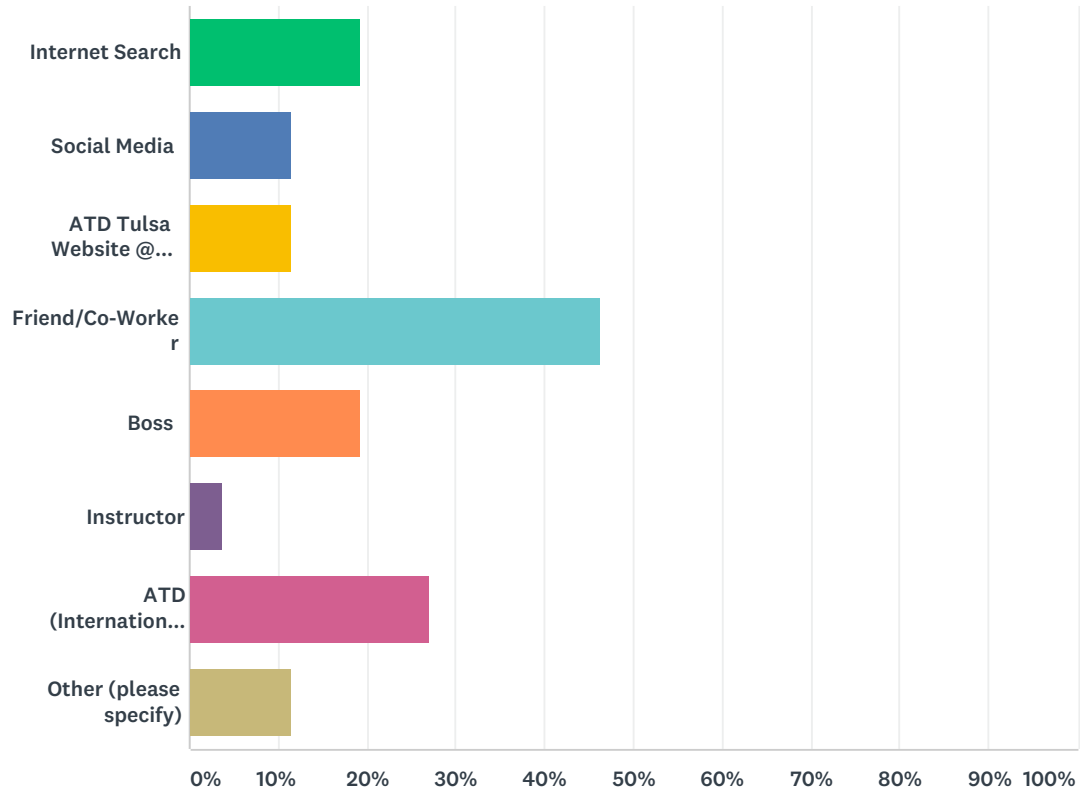
Answered: 26 Skipped: 1



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

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

Answered: 26 Skipped: 1



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

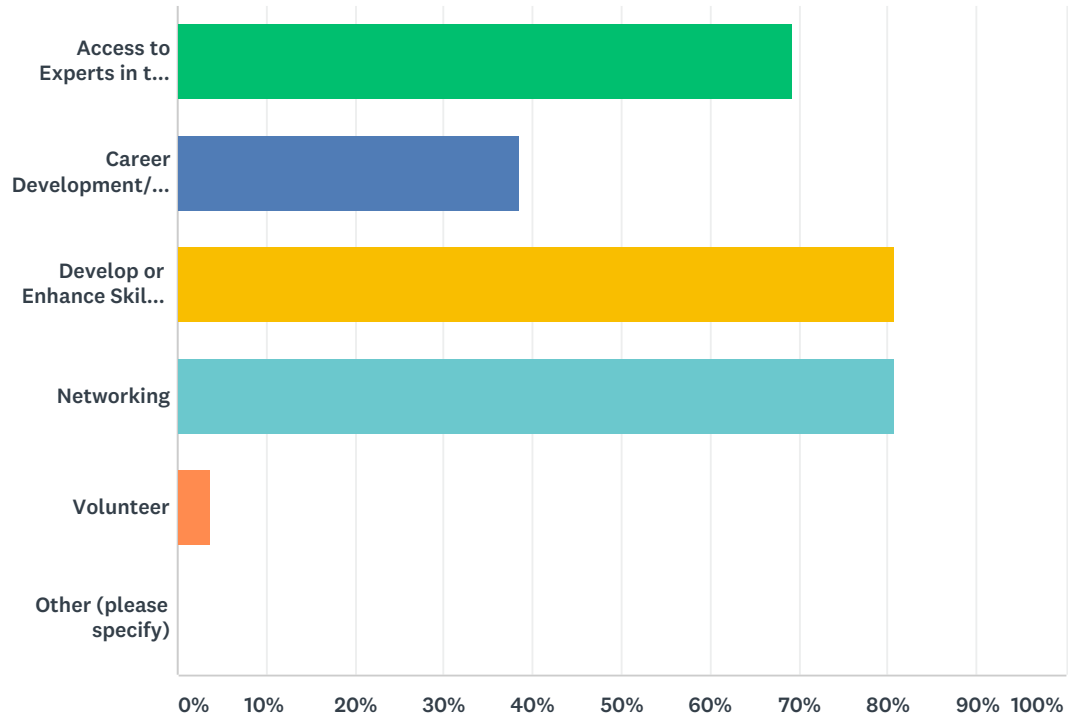
ATD Tulsa Annual Membership Survey 2018

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

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

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

Answered: 26 Skipped: 1



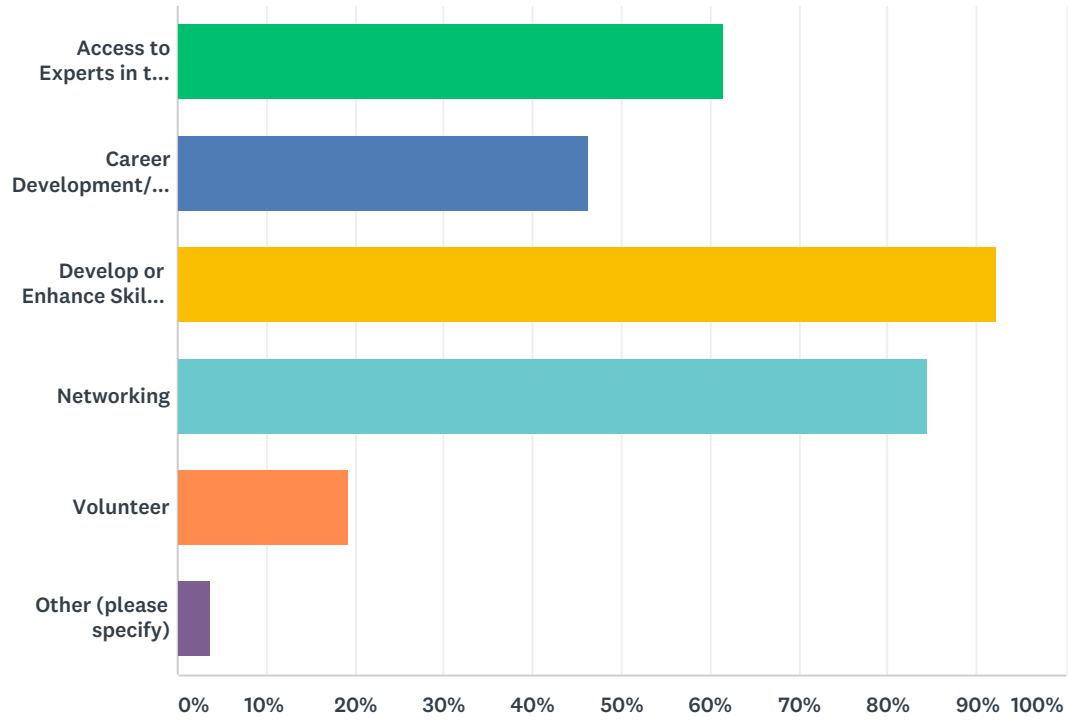
ANSWER CHOICES	RESPONSES	
Access to Experts in the Field	69.23%	18
Career Development/Find a Job	38.46%	10
Develop or Enhance Skills and Knowledge	80.77%	21
Networking	80.77%	21
Volunteer	3.85%	1
Other (please specify)	0.00%	0
Total Respondents: 26		

ATD Tulsa Annual Membership Survey 2018

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

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

Answered: 26 Skipped: 1



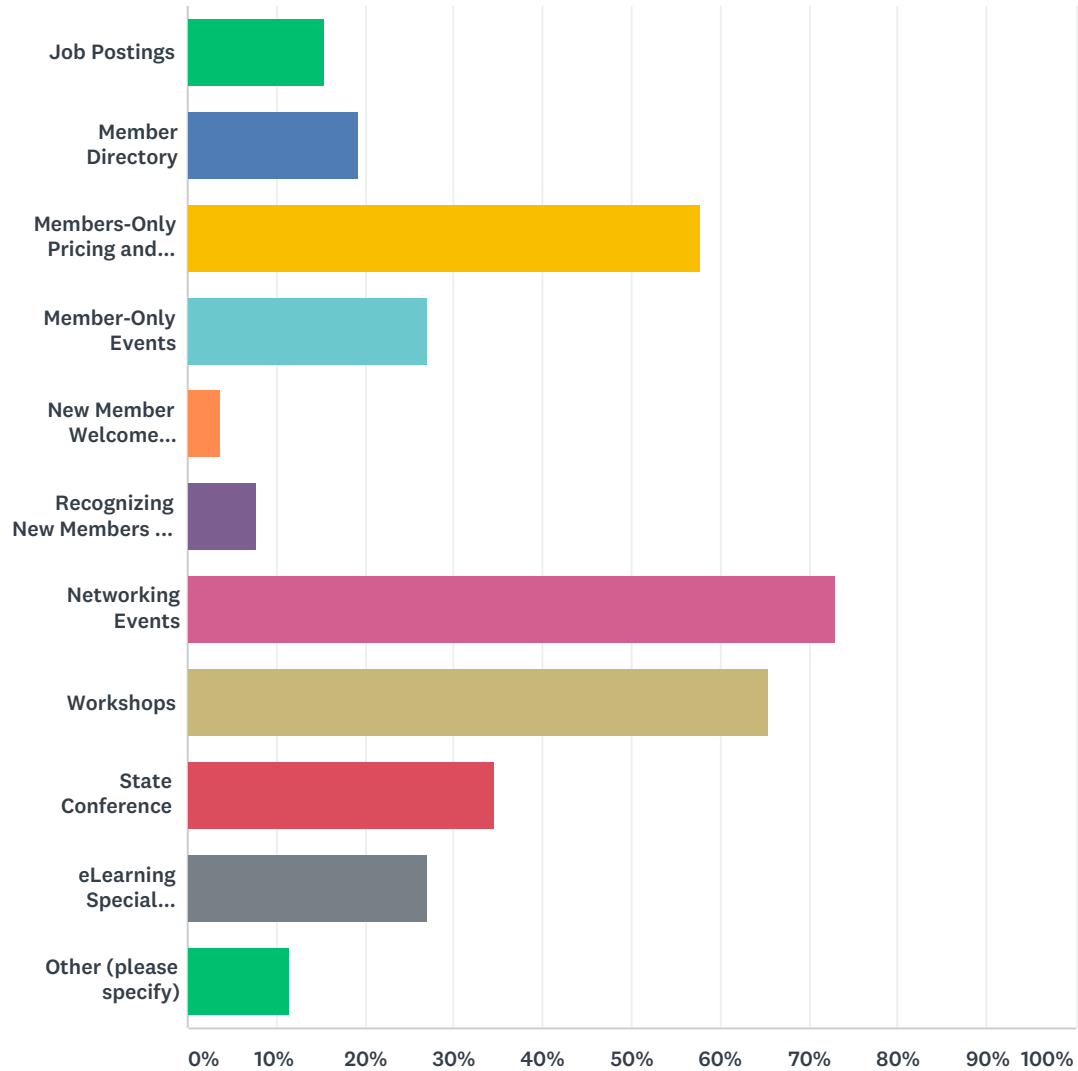
ANSWER CHOICES	RESPONSES
Access to Experts in the Field	61.54% 16
Career Development/Find a Job	46.15% 12
Develop or Enhance Skills and Knowledge	92.31% 24
Networking	84.62% 22
Volunteer	19.23% 5
Other (please specify)	3.85% 1
Total Respondents: 26	

ATD Tulsa Annual Membership Survey 2018

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

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

Answered: 26 Skipped: 1



ANSWER CHOICES

RESPONSES

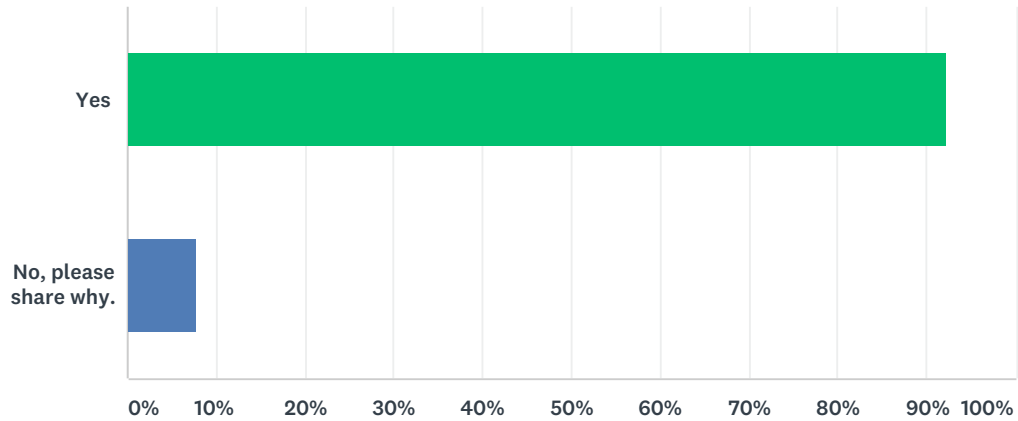
ATD Tulsa Annual Membership Survey 2018

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

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

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

Answered: 26 Skipped: 1



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

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

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

Answered: 26 Skipped: 1

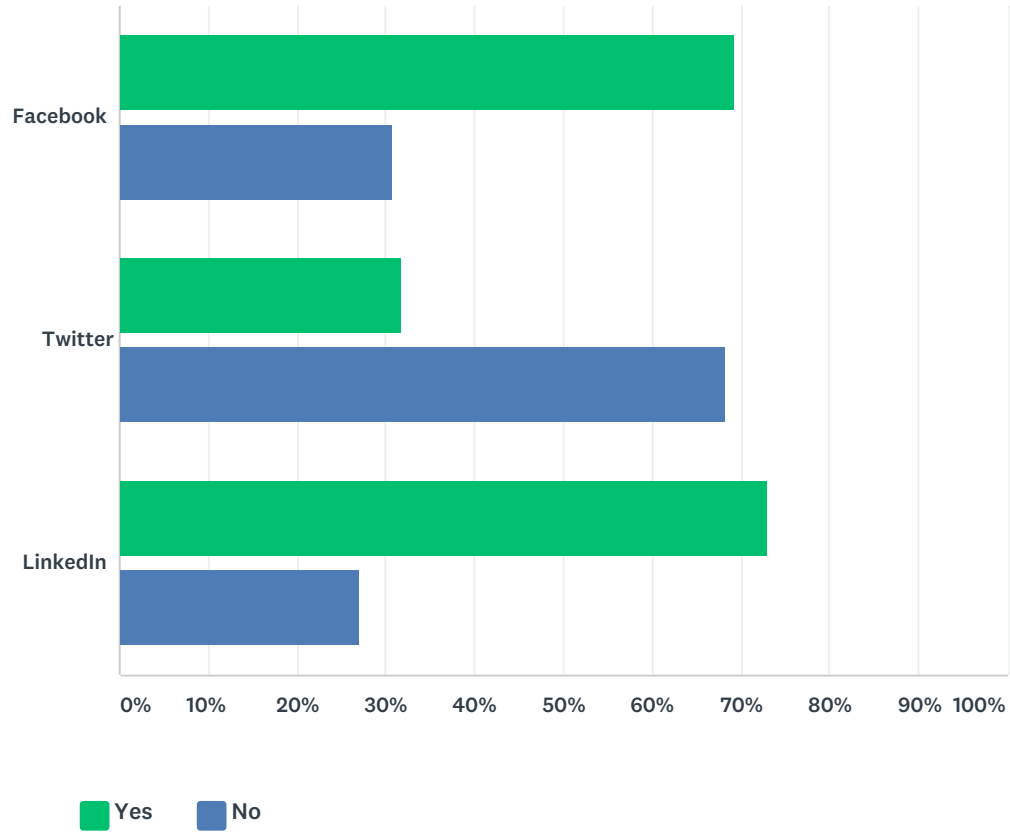
#	RESPONSES	DATE
1	none	9/26/2018 10:18 PM
2	None	9/25/2018 5:17 PM
3	The most vital aspect of membership for me is to garner powerful tools from meeting speakers.	9/21/2018 6:33 PM
4	i'm satisfied with the benefits as they are	9/21/2018 3:24 PM
5	None	9/21/2018 10:34 AM
6	Can't think of any at the moment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

ATD Tulsa Annual Membership Survey 2018

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

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

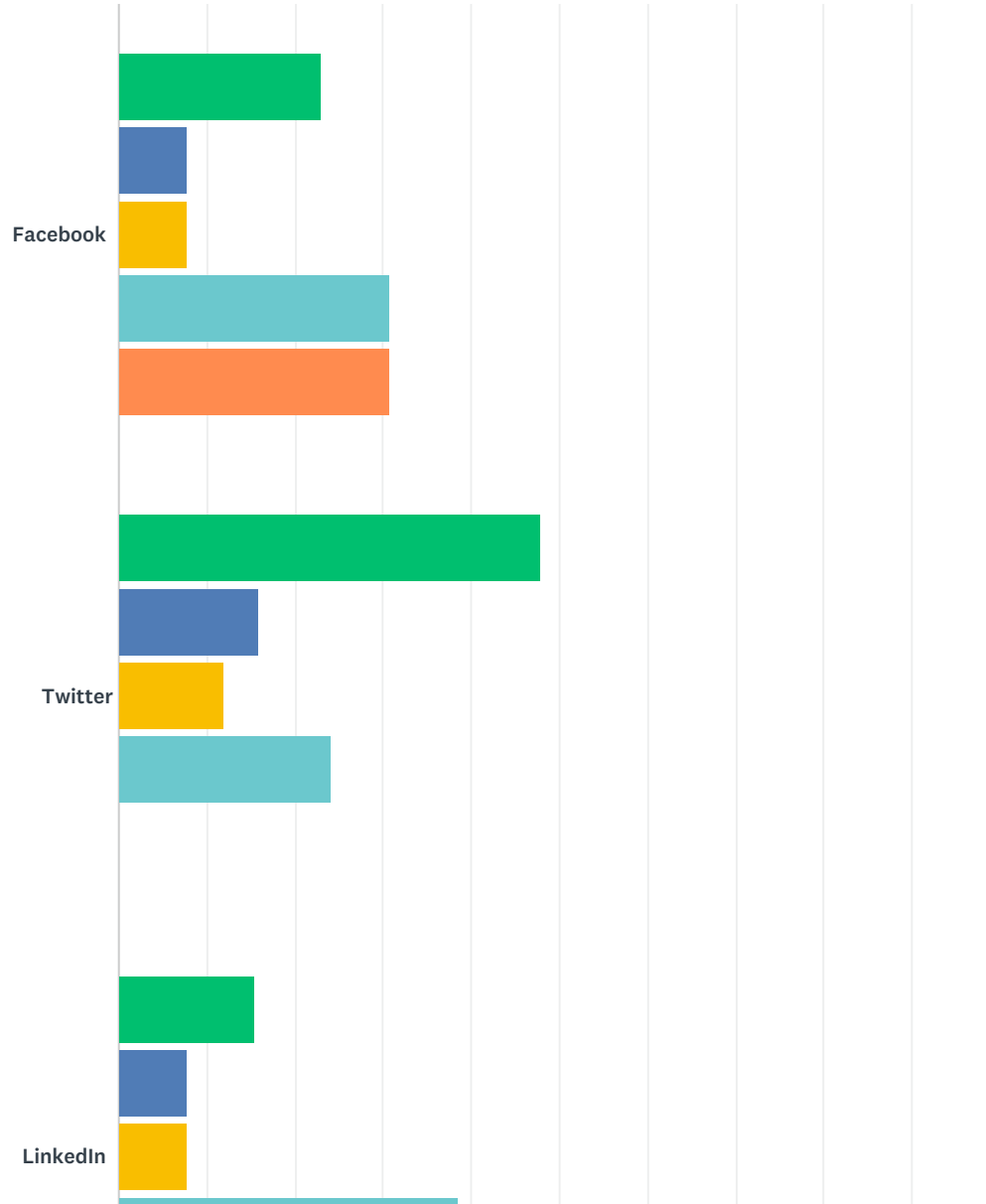
Answered: 26 Skipped: 1



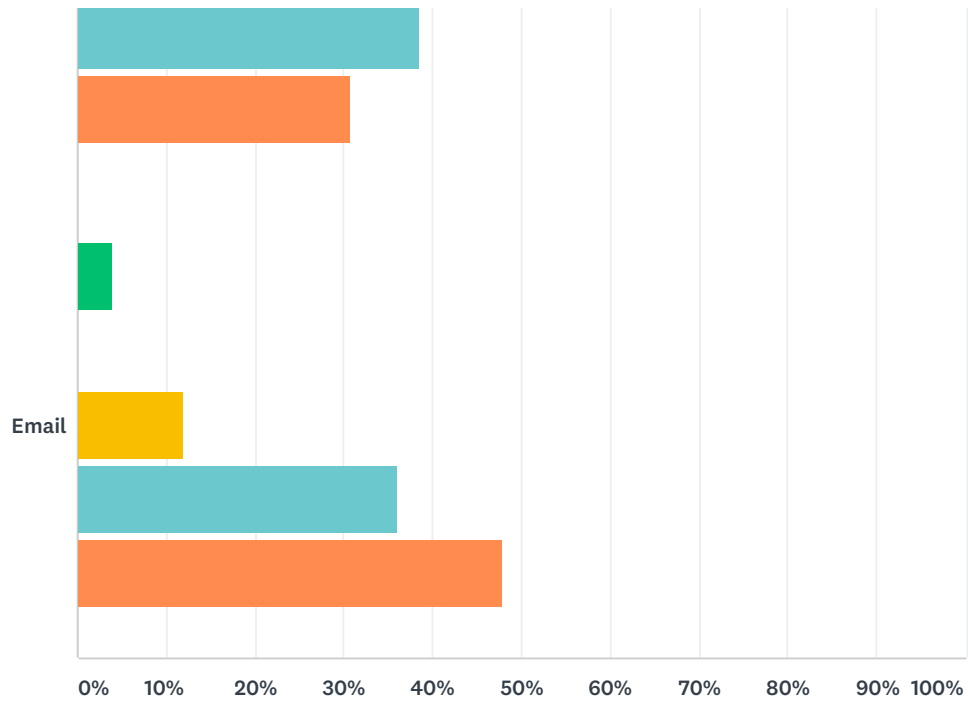
	YES	NO	TOTAL
Facebook	69.23% 18	30.77% 8	26
Twitter	31.82% 7	68.18% 15	22
LinkedIn	73.08% 19	26.92% 7	26

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

Answered: 26 Skipped: 1



ATD Tulsa Annual Membership Survey 2018

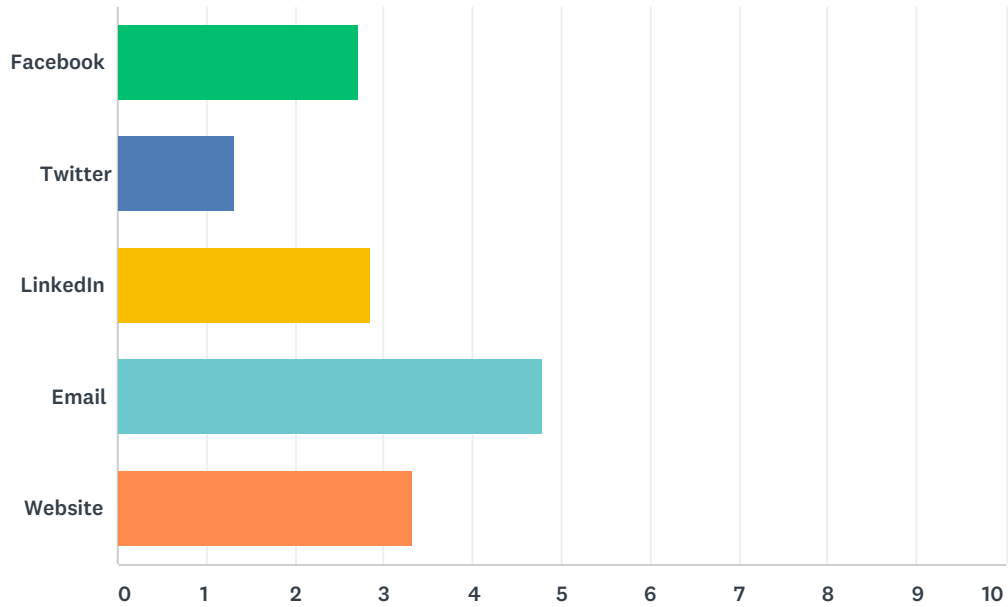


■ Very unlikely
 ■ Unlikely
 ■ Neither likely nor unlikely
 ■ Likely
■ Very likely

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

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

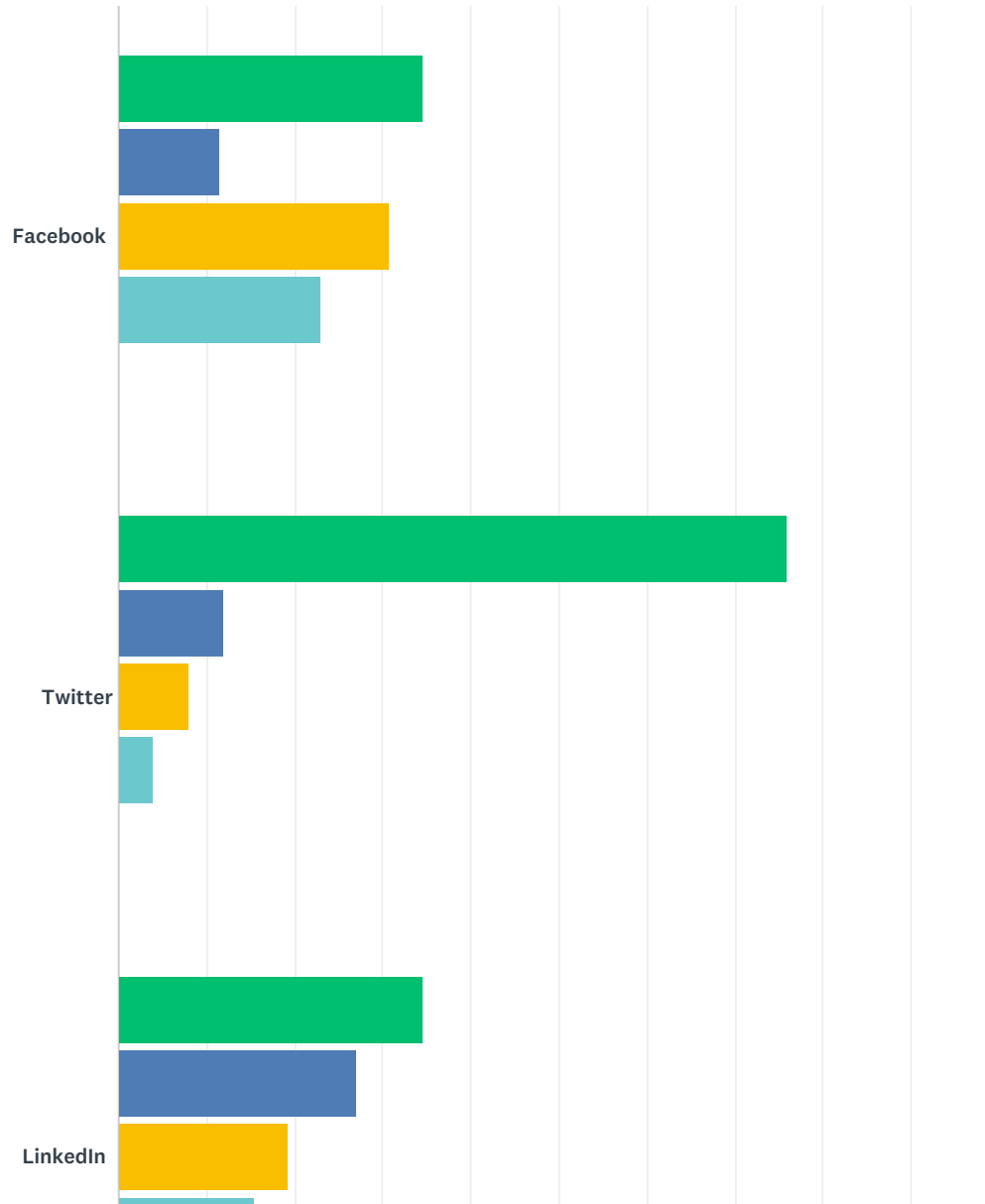
Answered: 25 Skipped: 2



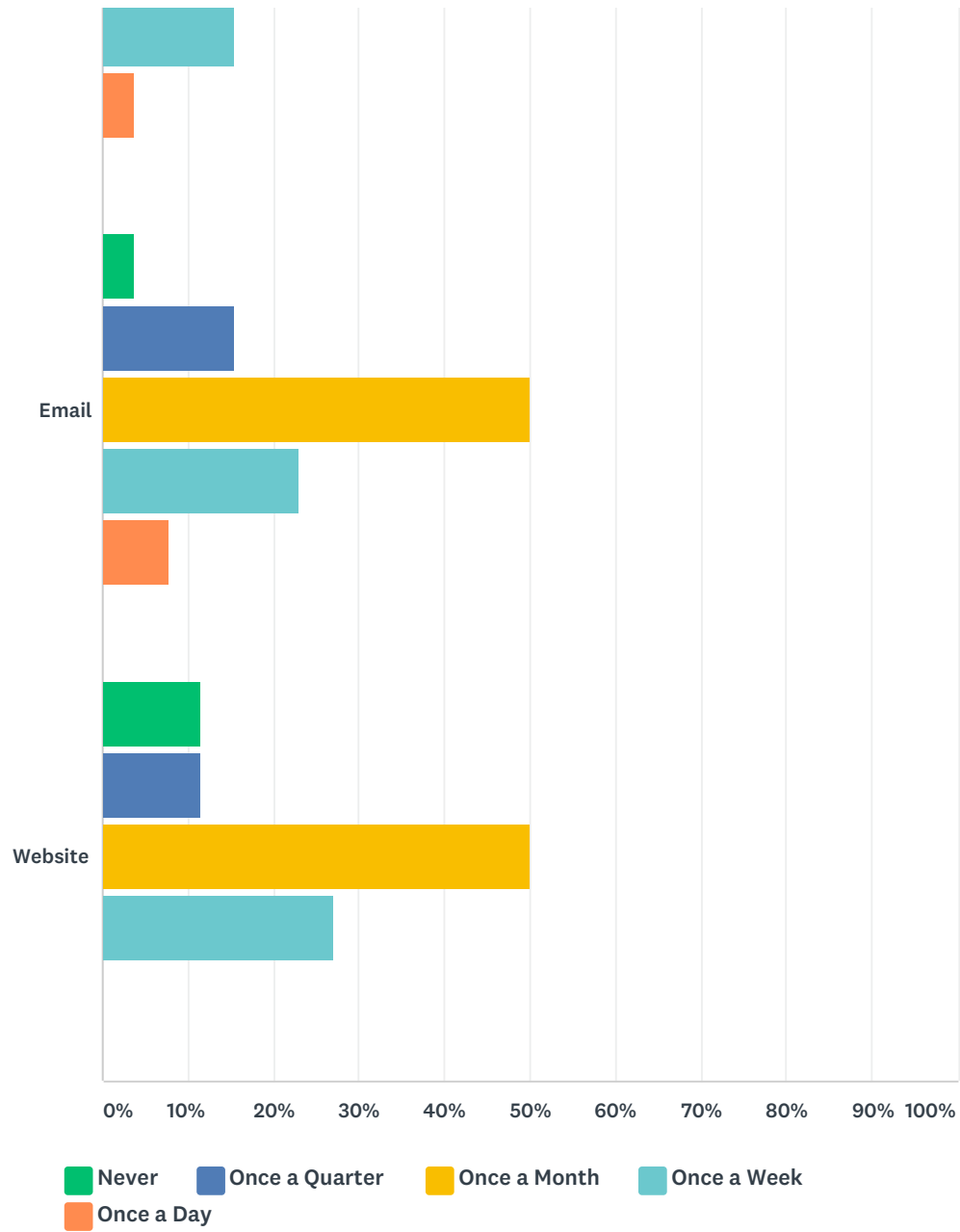
	1	2	3	4	5	TOTAL	SCORE
Facebook	8.00% 2	16.00% 4	24.00% 6	44.00% 11	8.00% 2	25	2.72
Twitter	0.00% 0	4.00% 1	4.00% 1	12.00% 3	80.00% 20	25	1.32
LinkedIn	4.00% 1	12.00% 3	56.00% 14	20.00% 5	8.00% 2	25	2.84
Email	80.00% 20	20.00% 5	0.00% 0	0.00% 0	0.00% 0	25	4.80
Website	8.00% 2	48.00% 12	16.00% 4	24.00%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

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

Answered: 26 Skipped: 1



ATD Tulsa Annual Membership Survey 2018



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

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

Q18 What is your home zip code?

Answered: 26 Skipped: 1

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

ATD Tulsa Annual Membership Survey 2018

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

Q19 What is your work zip code?

Answered: 26 Skipped: 1

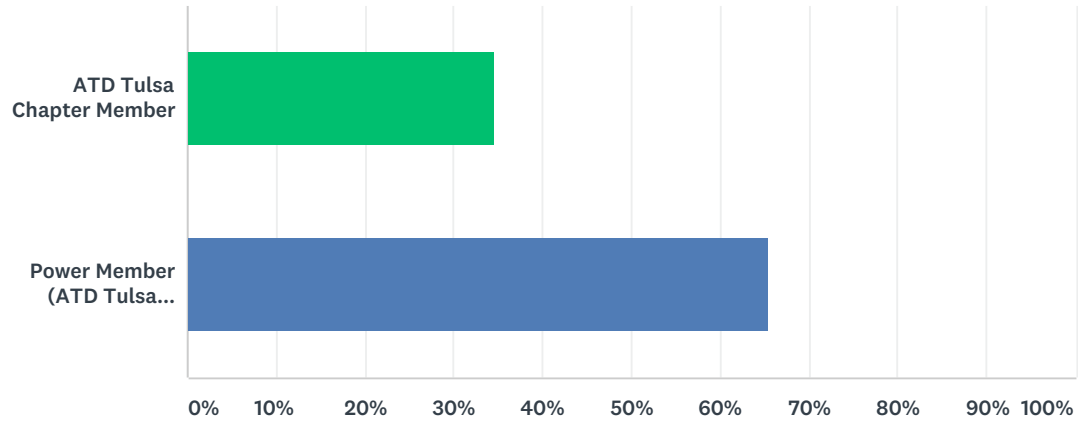
#	RESPONSES	DATE
1	74114	9/26/2018 10:27 PM
2	74104	9/25/2018 5:19 PM
3	74133	9/21/2018 6:35 PM
4	74135	9/21/2018 3:26 PM
5	74103	9/21/2018 10:45 AM
6	74106	9/21/2018 10:36 AM
7	74146	9/21/2018 10:17 AM
8	74008	9/21/2018 9:51 AM
9	74133	9/21/2018 9:50 AM
10	74172	9/21/2018 9:44 AM
11	.	9/21/2018 9:37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

ATD Tulsa Annual Membership Survey 2018

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

Q20 What is your level of membership within ATD?

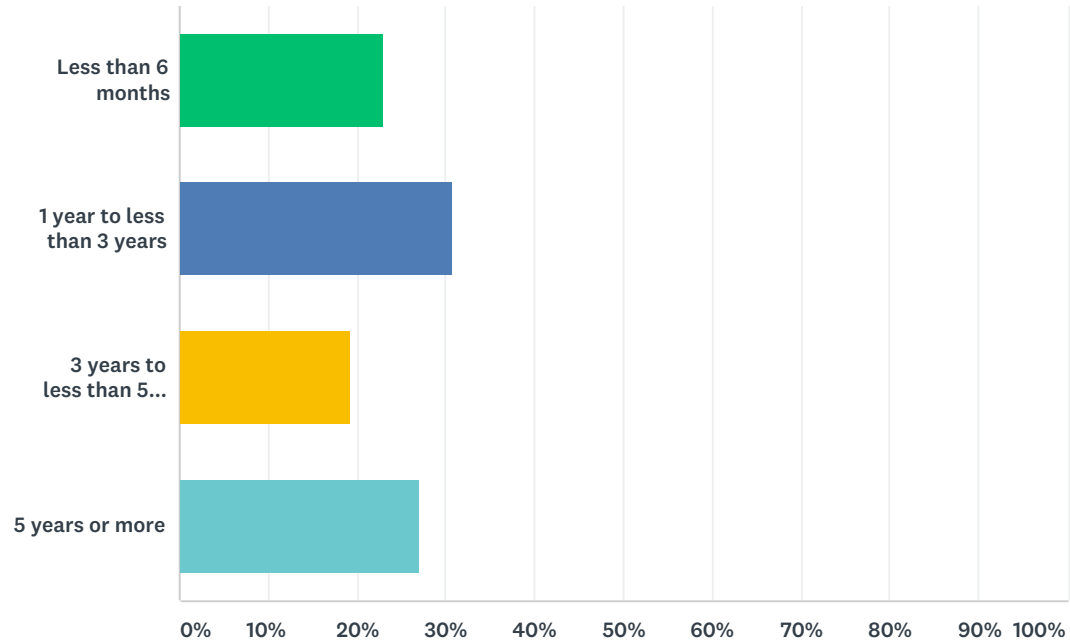
Answered: 26 Skipped: 1



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

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

Answered: 26 Skipped: 1

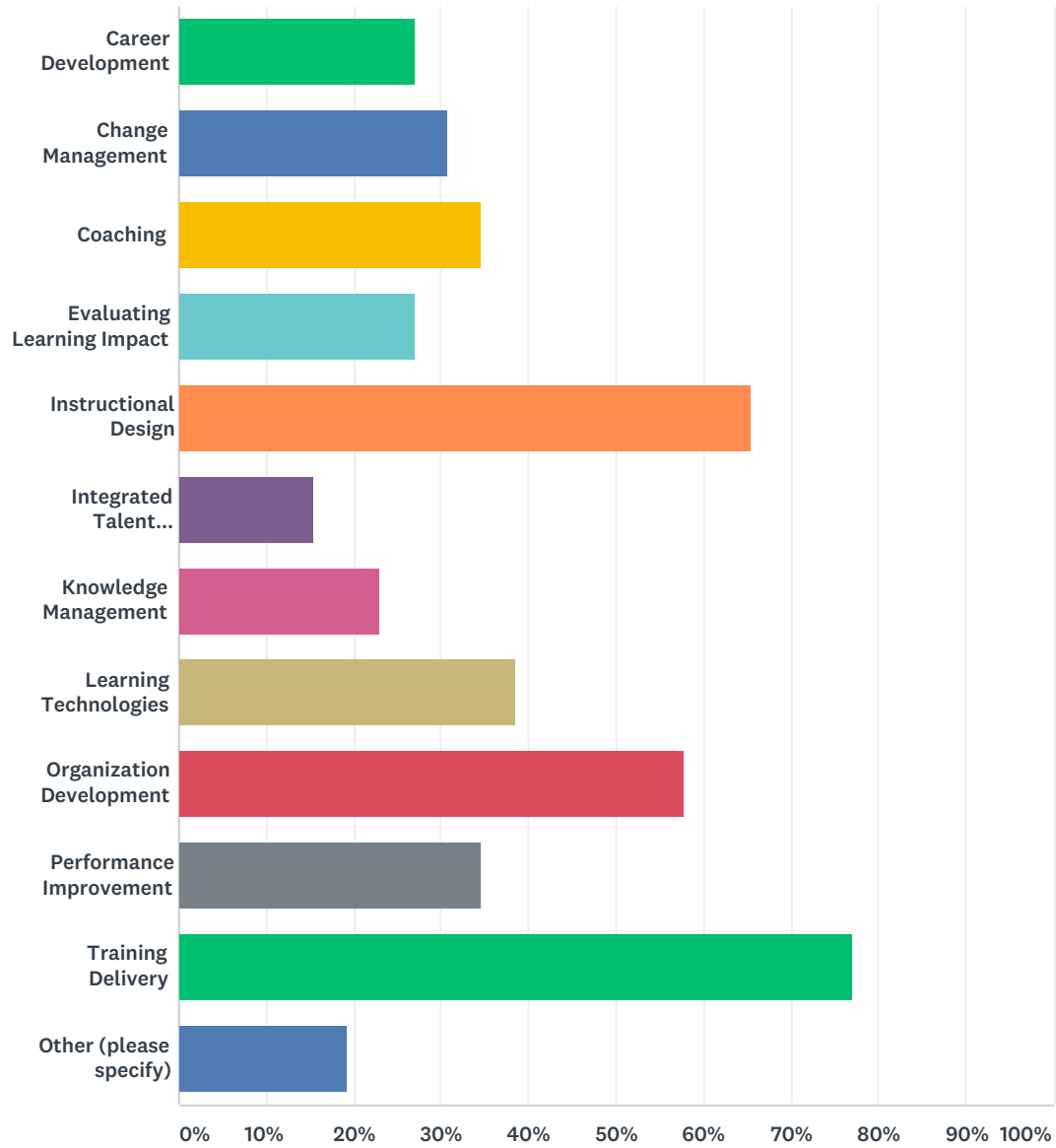


ANSWER CHOICES	RESPONSES	
Less than 6 months	23.08%	6
1 year to less than 3 years	30.77%	8
3 years to less than 5 years	19.23%	5
5 years or more	26.92%	7
TOTAL		26

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

Answered: 26 Skipped: 1

ATD Tulsa Annual Membership Survey 2018



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

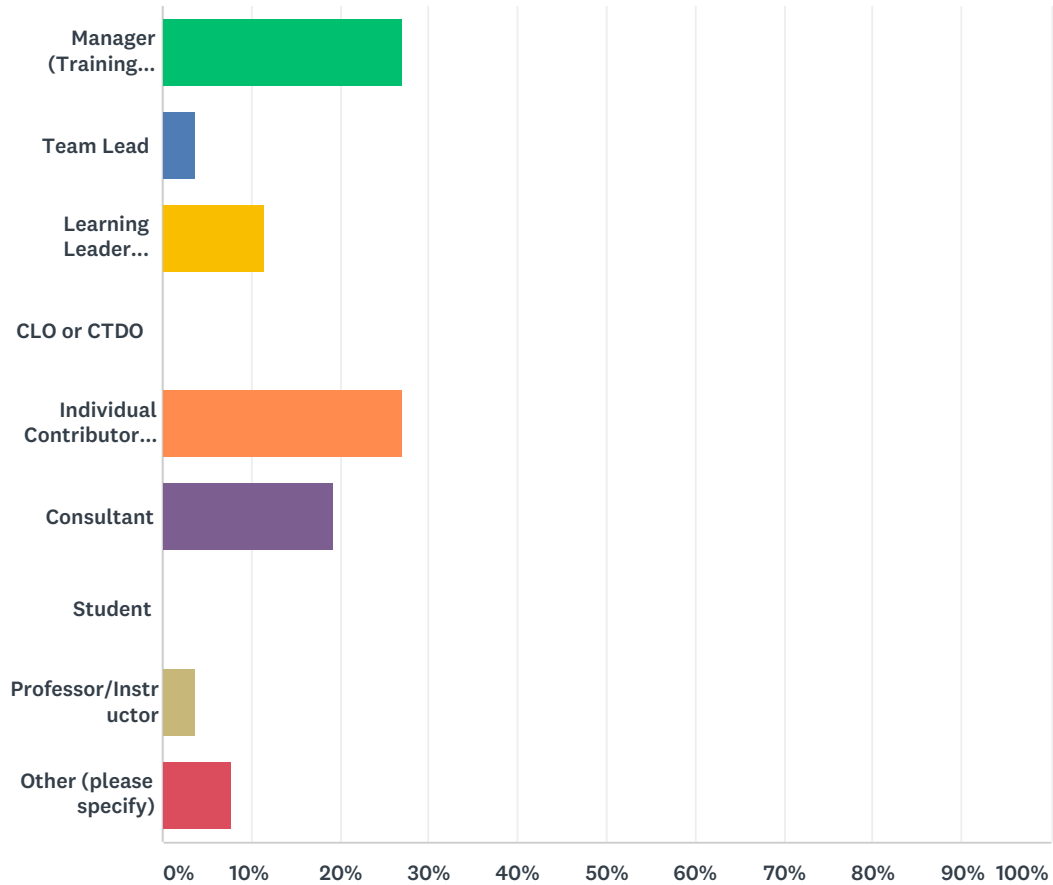
ATD Tulsa Annual Membership Survey 2018

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

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

Q23 What is your professional level?

Answered: 26 Skipped: 1



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

ATD Tulsa Annual Membership Survey 2018

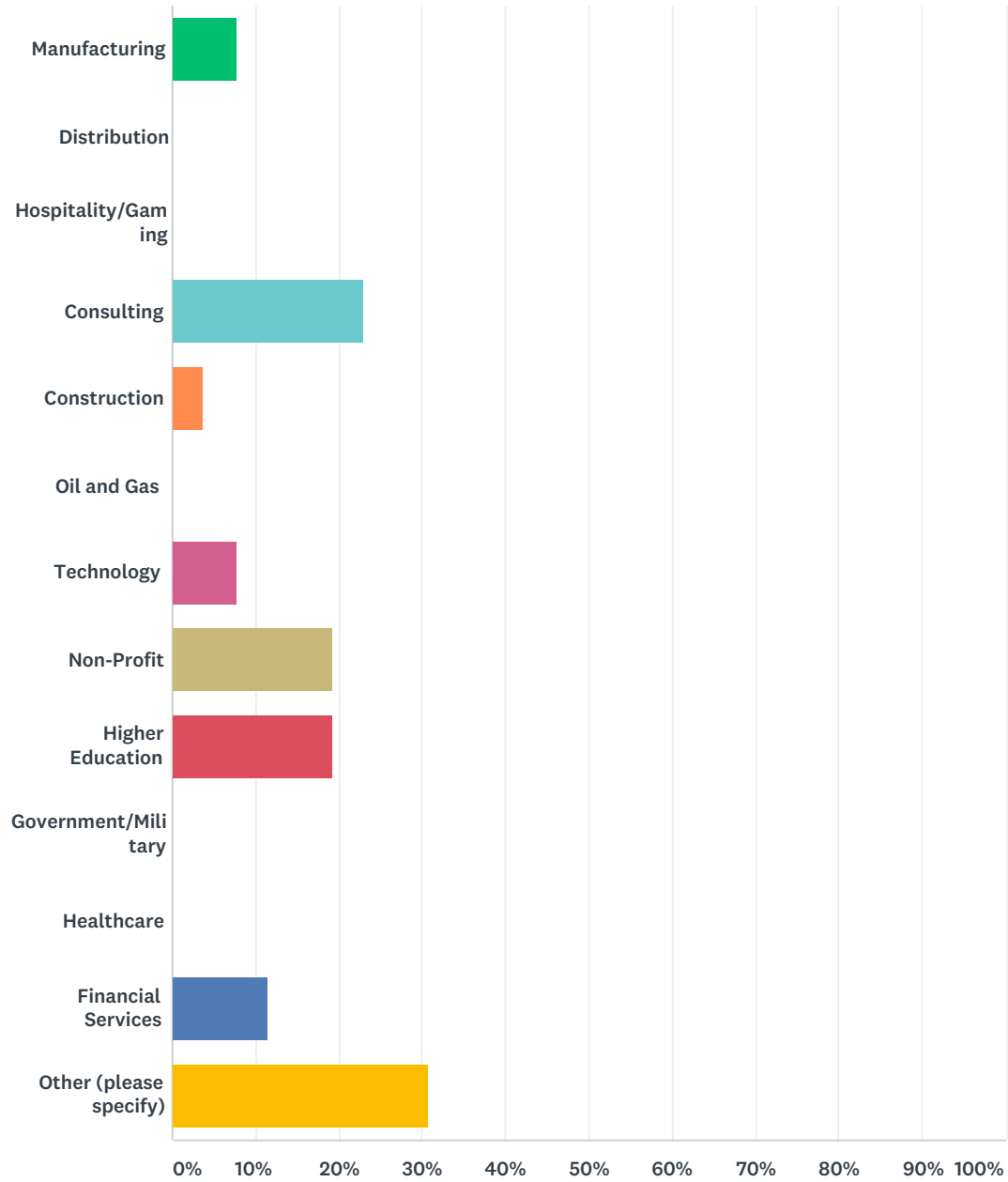
Individual Contributor (Training Specialist, HR Generalist, Instructional Designer, LMS Administrator)	26.92%	7
Consultant	19.23%	5
Student	0.00%	0
Professor/Instructor	3.85%	1
Other (please specify)	7.69%	2
TOTAL		26

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

Q24 What is your company's industry?

Answered: 26 Skipped: 1

ATD Tulsa Annual Membership Survey 2018



ANSWER CHOICES

RESPONSES

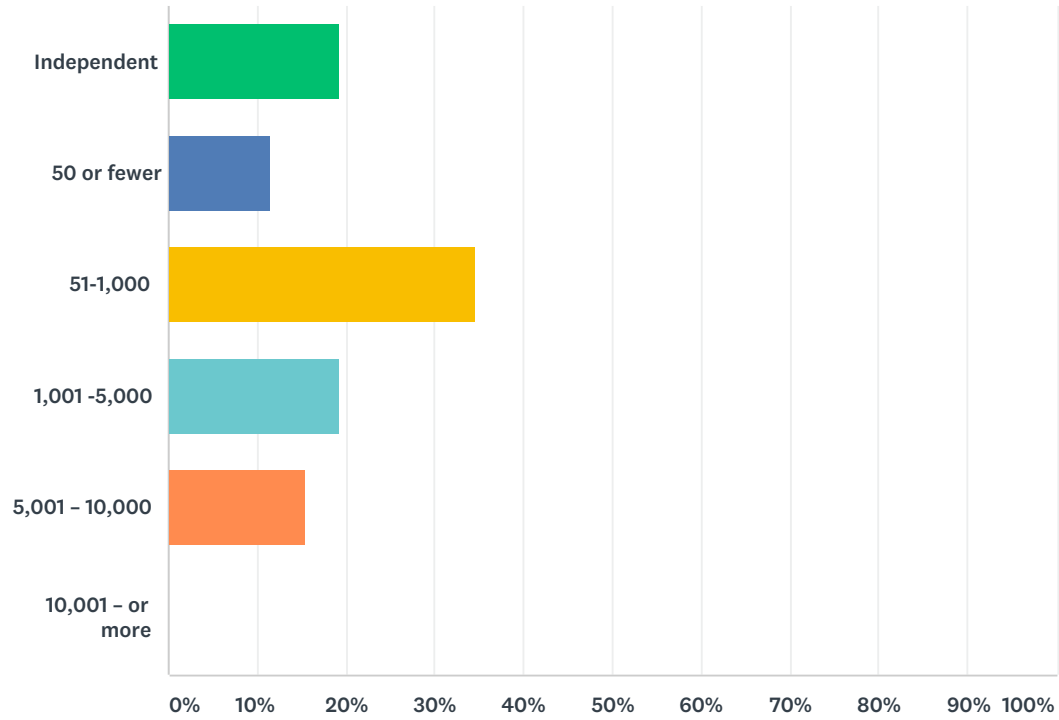
ATD Tulsa Annual Membership Survey 2018

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

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

Q25 How many employees are in your organization?

Answered: 26 Skipped: 1



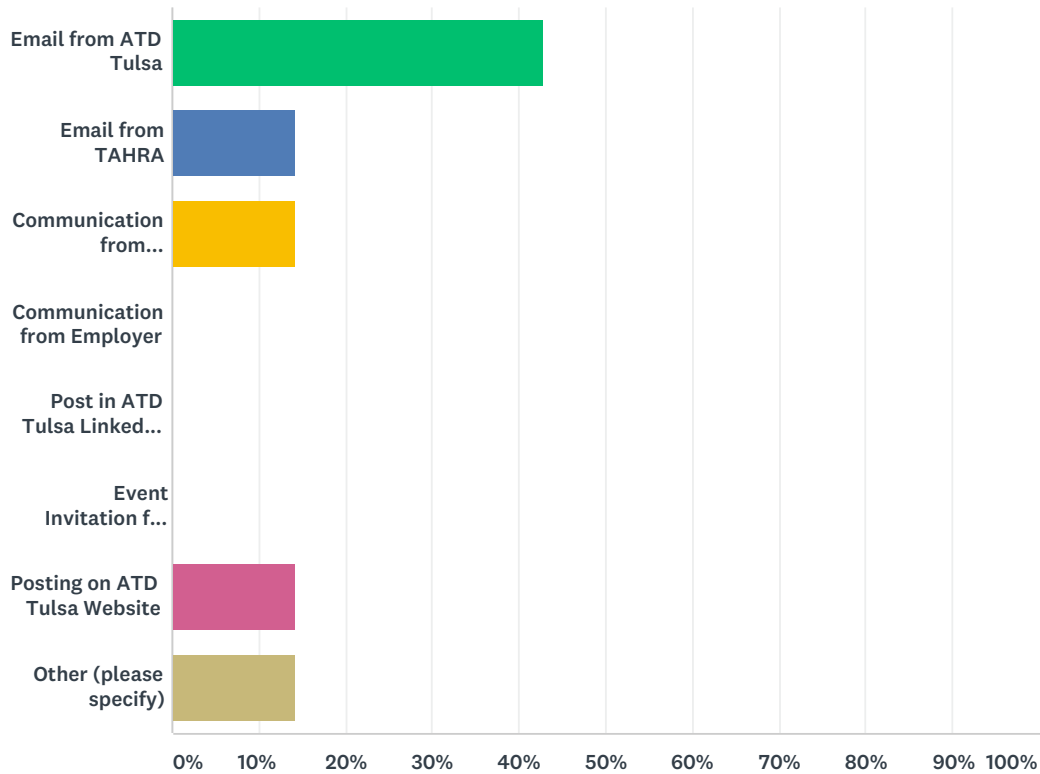
ANSWER CHOICES	RESPONSES	
Independent	19.23%	5
50 or fewer	11.54%	3
51-1,000	34.62%	9
1,001 -5,000	19.23%	5
5,001 – 10,000	15.38%	4
10,001 – or more	0.00%	0
TOTAL		26



Gamification Workshop Survey

Q1 How did you hear about this ATD Tulsa workshop?

Answered: 7 Skipped: 0

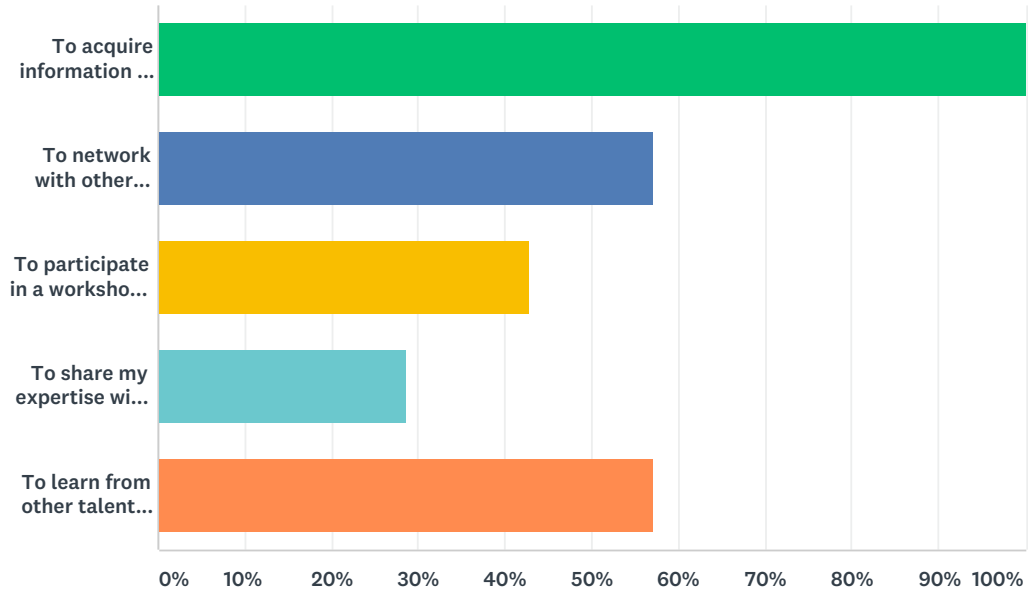


ANSWER CHOICES	RESPONSES
Email from ATD Tulsa	42.86% 3
Email from TAHRA	14.29% 1
Communication from Colleague/Friend	14.29% 1
Communication from Employer	0.00% 0
Post in ATD Tulsa LinkedIn Group	0.00% 0
Event Invitation from ATD Tulsa's Facebook Page	0.00% 0
Posting on ATD Tulsa Website	14.29% 1
Other (please specify)	14.29% 1
TOTAL	7

#	OTHER (PLEASE SPECIFY)	DATE
1	atd tulsa monthly meeting	10/1/2018 8:32 AM

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

Answered: 7 Skipped: 0

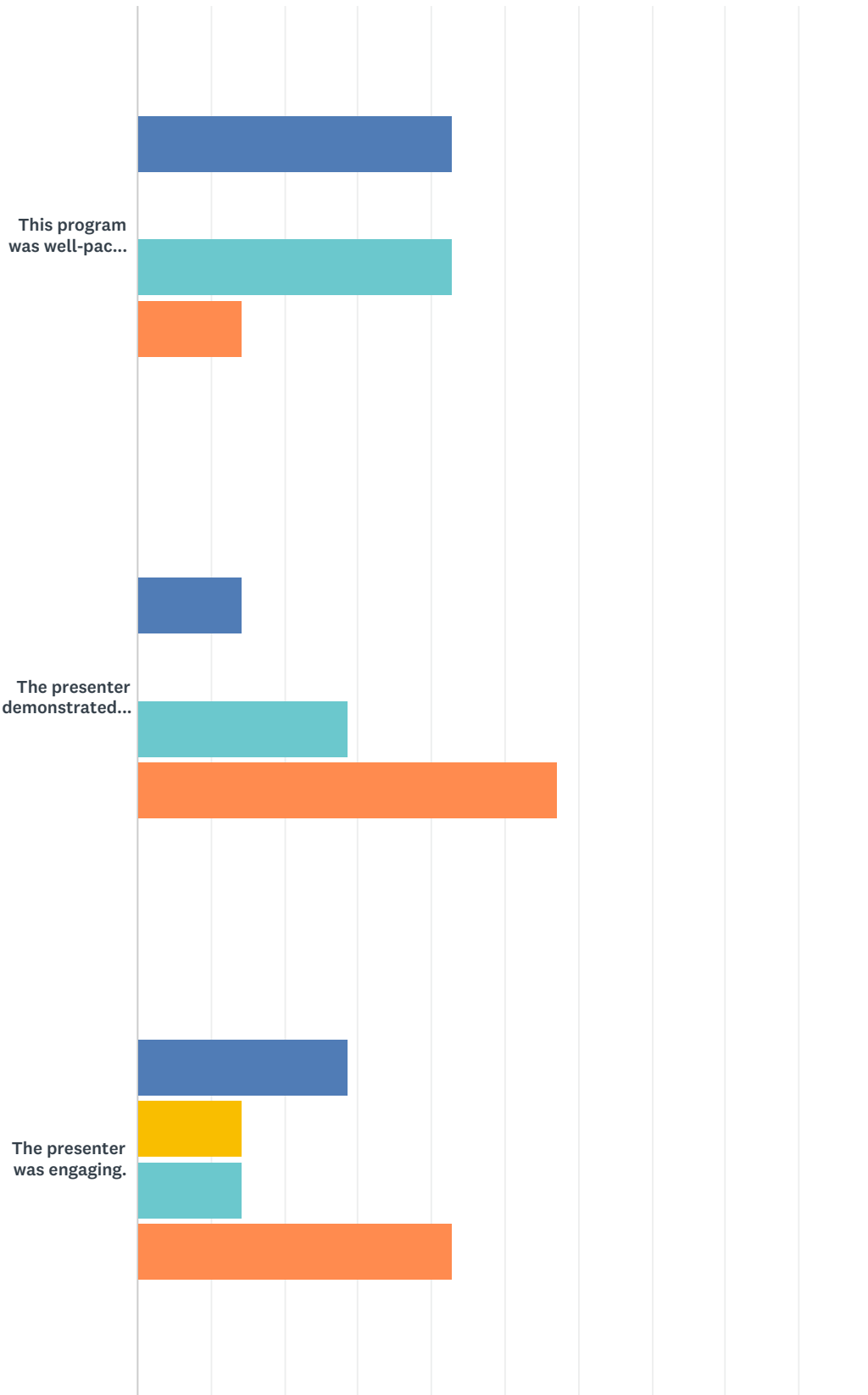


ANSWER CHOICES	RESPONSES	
To acquire information on the workshop topic.	100.00%	7
To network with other talent management professionals.	57.14%	4
To participate in a workshop presented by the speaker.	42.86%	3
To share my expertise with other talent management professionals.	28.57%	2
To learn from other talent management professionals attending.	57.14%	4
Total Respondents: 7		

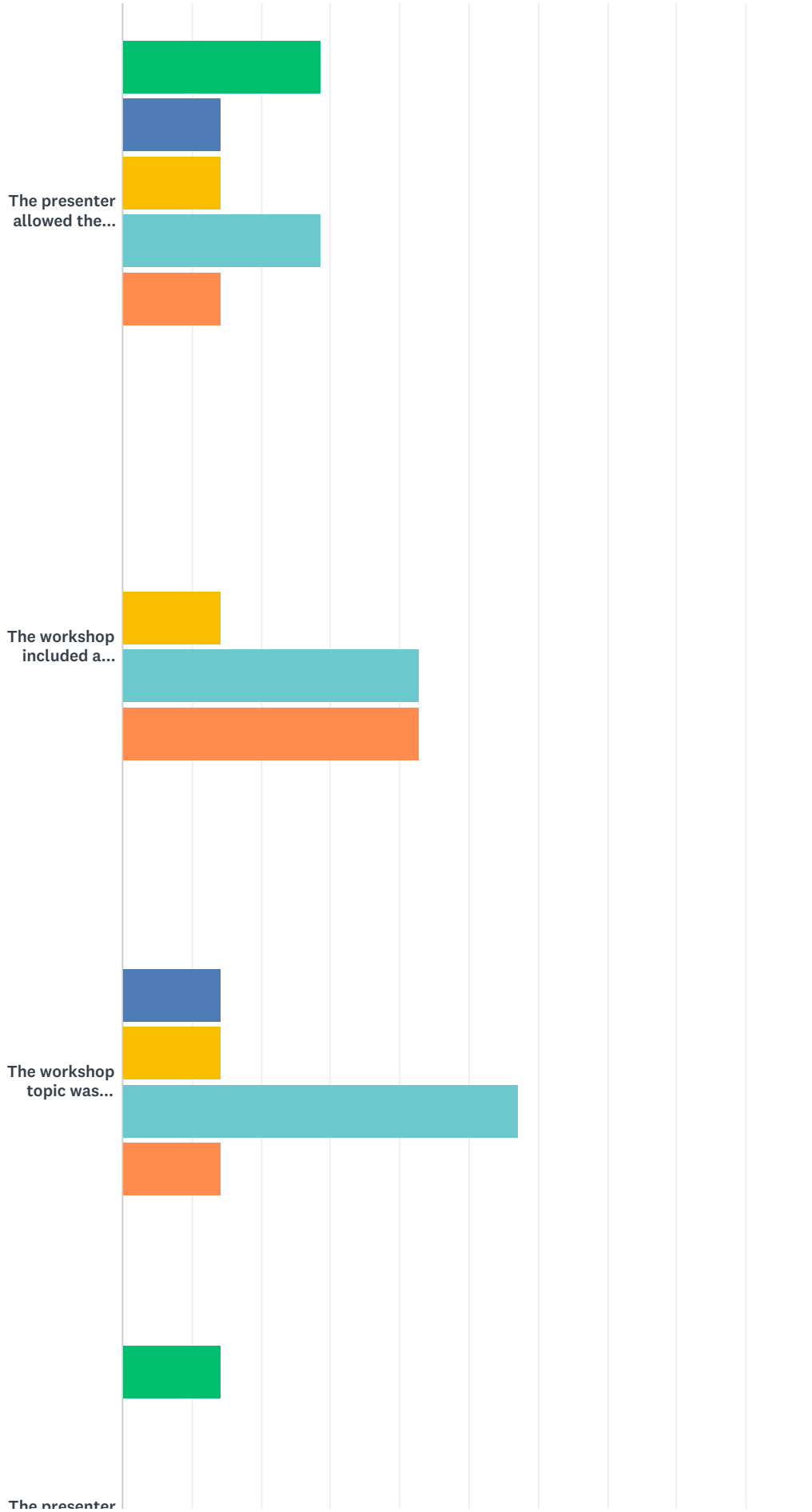
#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

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

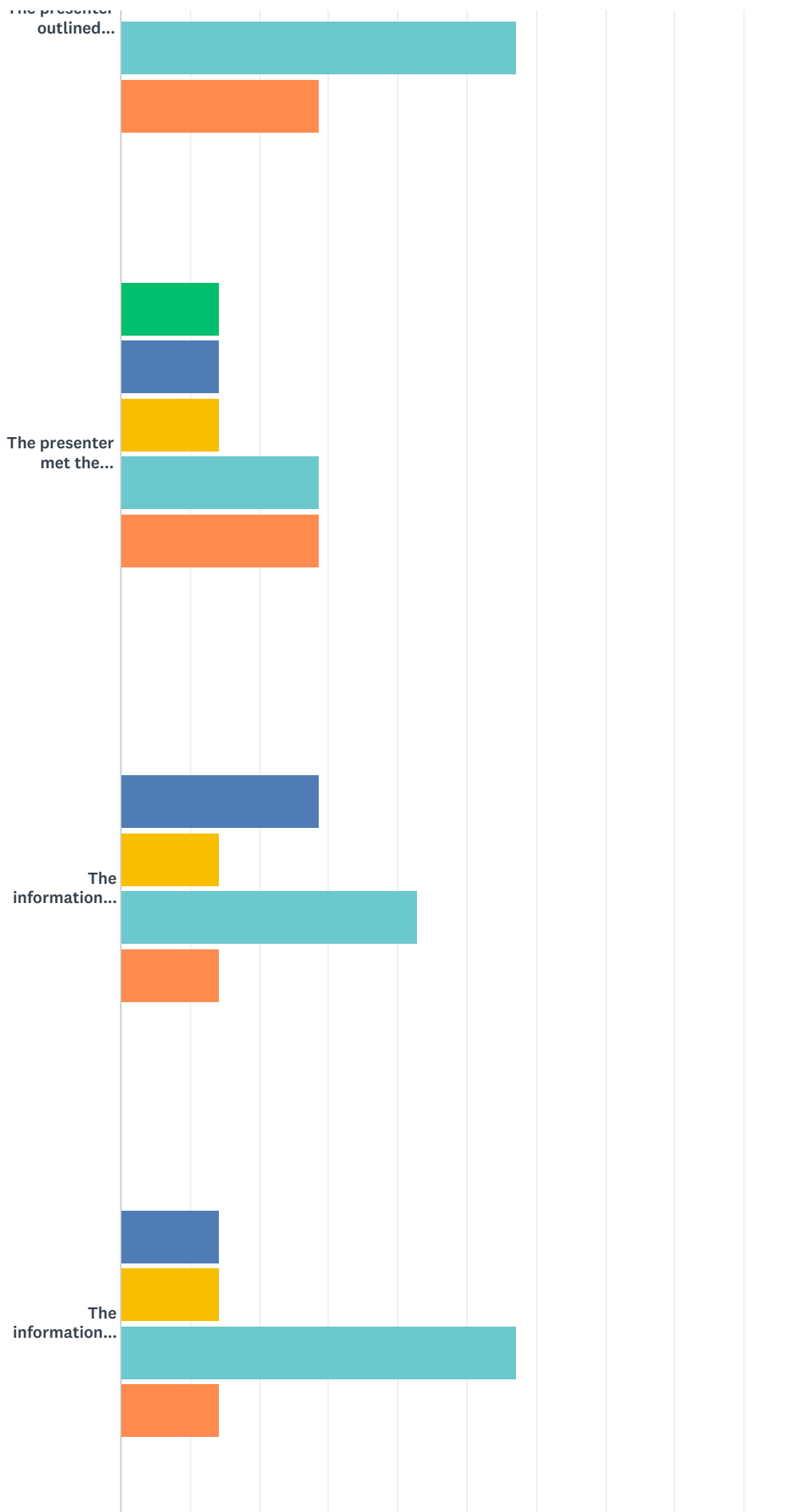
Answered: 7 Skipped: 0



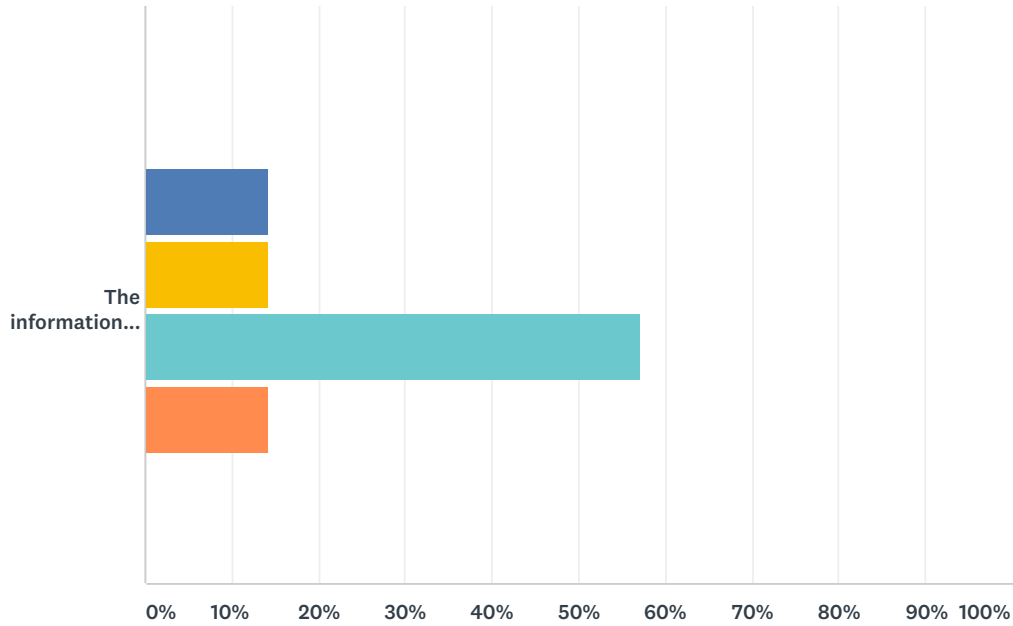
ATD Tulsa - September 28, 2018 Gamification Workshop Survey



ATD Tulsa - September 28, 2018 Gamification Workshop Survey



ATD Tulsa - September 28, 2018 Gamification Workshop Survey



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

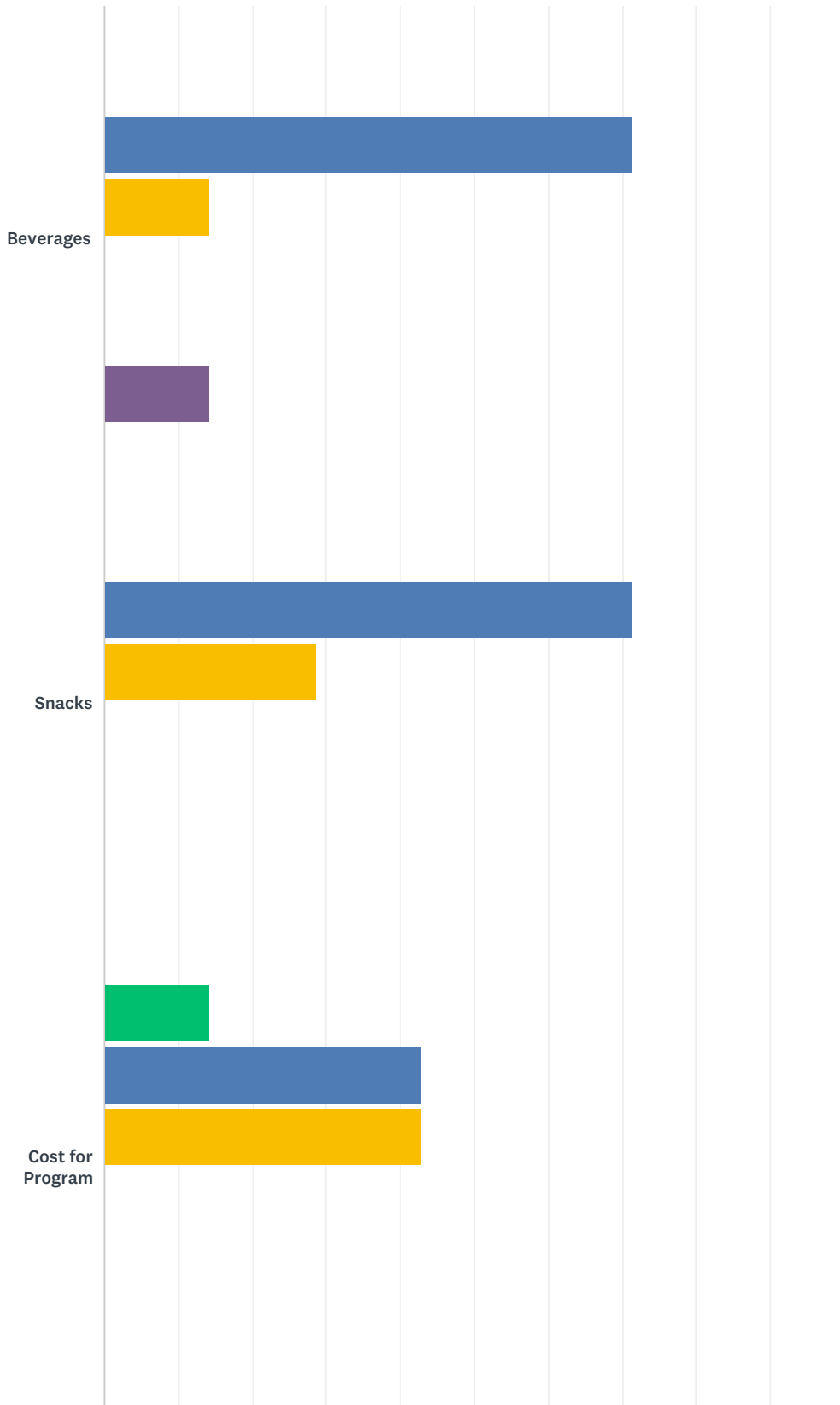
	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	NOT APPLICABLE	TOTAL
This program was well-paced and made good use of my time.	0.00% 0	42.86% 3	0.00% 0	42.86% 3	14.29% 1	0.00% 0	7
The presenter demonstrated subject matter expertise and knowledge.	0.00% 0	14.29% 1	0.00% 0	28.57% 2	57.14% 4	0.00% 0	7
The presenter was engaging.	0.00% 0	28.57% 2	14.29% 1	14.29% 1	42.86% 3	0.00% 0	7
The presenter allowed the right amount of time for discussion.	28.57% 2	14.29% 1	14.29% 1	28.57% 2	14.29% 1	0.00% 0	7
The workshop included a hands-on learning activity.	0.00% 0	0.00% 0	14.29% 1	42.86% 3	42.86% 3	0.00% 0	7
The workshop topic was delivered as promoted.	0.00% 0	14.29% 1	14.29% 1	57.14% 4	14.29% 1	0.00% 0	7
The presenter outlined objectives for the session.	14.29% 1	0.00% 0	0.00% 0	57.14% 4	28.57% 2	0.00% 0	7
The presenter met the objectives as outlined.	14.29% 1	14.29% 1	14.29% 1	28.57% 2	28.57% 2	0.00% 0	7
The information presented during this workshop was well organized.	0.00% 0	28.57% 2	14.29% 1	42.86% 3	14.29% 1	0.00% 0	7
The information presented during this workshop is useful to my job.	0.00% 0	14.29% 1	14.29% 1	57.14% 4	14.29% 1	0.00% 0	7
The information presented during this workshop can be applied to my business.	0.00% 0	14.29% 1	14.29% 1	57.14% 4	14.29% 1	0.00% 0	7

ATD Tulsa - September 28, 2018 Gamification Workshop Survey

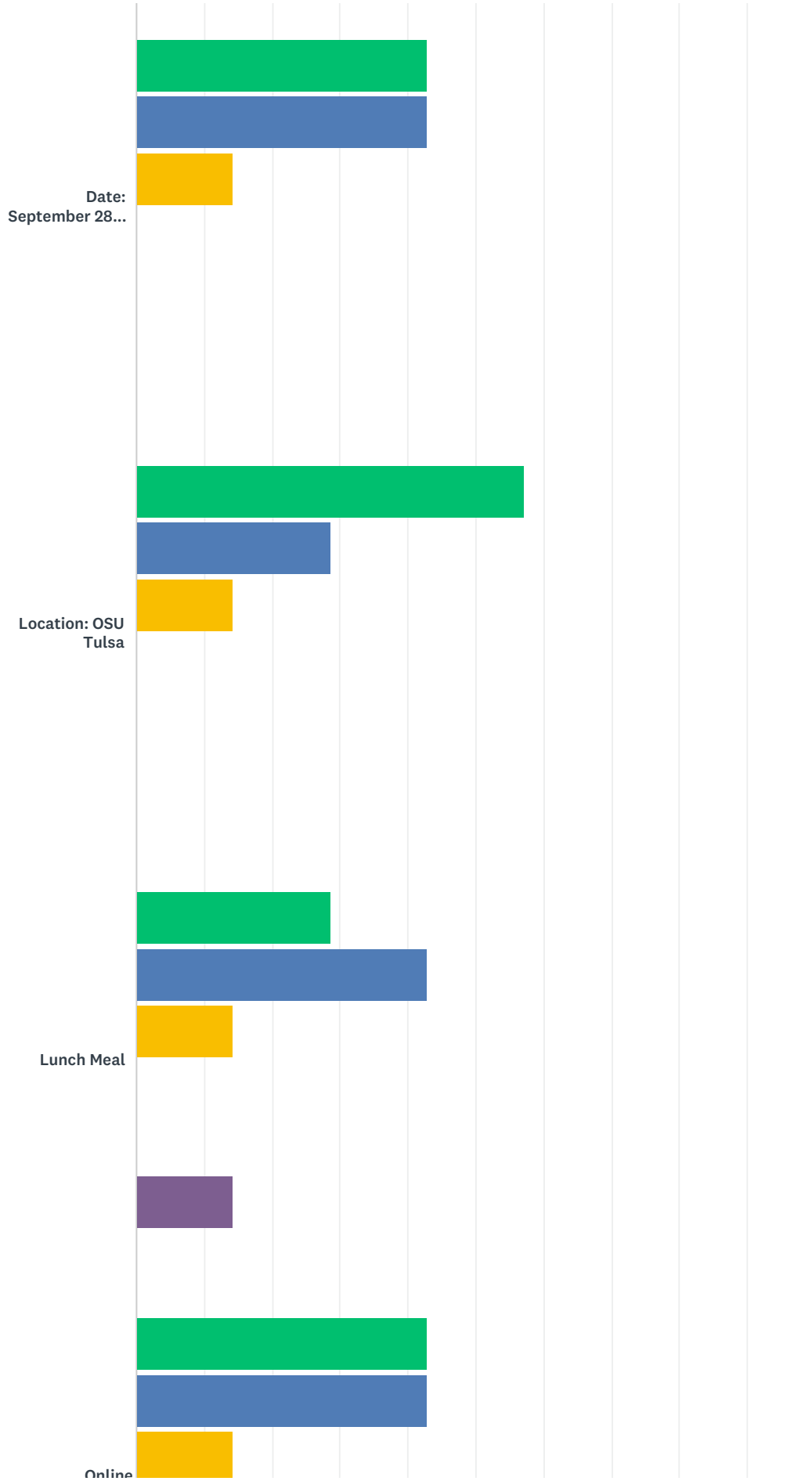
#	IF YOU RATED ANY STATEMENT(S) AS "STRONGLY DISAGREE" OR "DISAGREE," WHAT COULD BE DONE DIFFERENTLY TO CHANGE YOUR RESPONSE TO "STRONGLY AGREE?"	DATE
1	The presenter often went of topic is a way which made the material hard to follow. Additionally, the presenter focused on abstract theories of gamification rather than exploring best practices and learning activities that had worked in the "field".	10/1/2018 3:21 PM
2	There was not much time at all devoted to Q&A. This workshop could definitely have been done in a half day rather than a full day. I felt like there was too much time devoted to frivolous info like player styles and coming up with stories - the pirate theme felt forced and wasn't really fun at all.	10/1/2018 8:32 AM

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

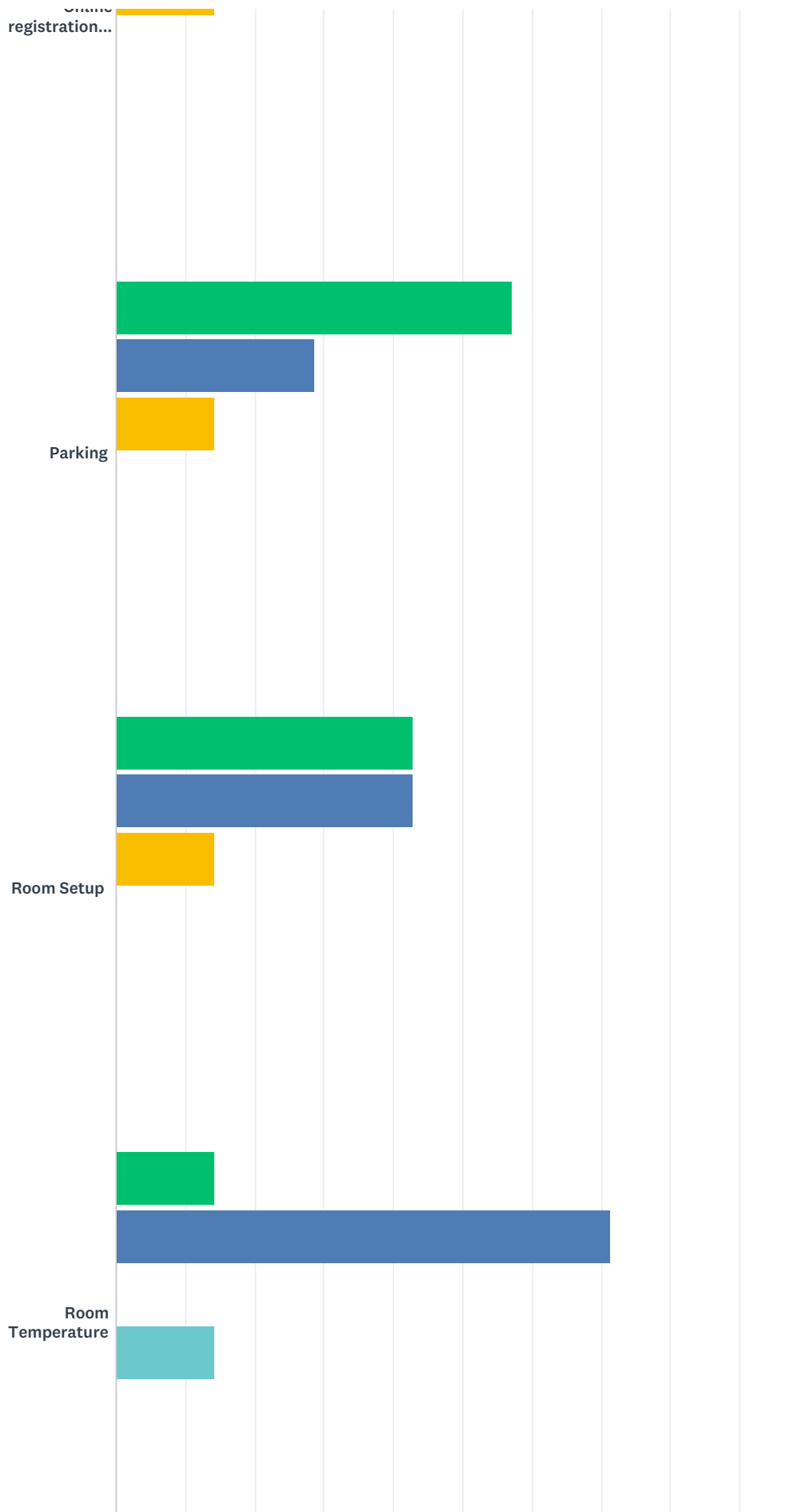
Answered: 7 Skipped: 0



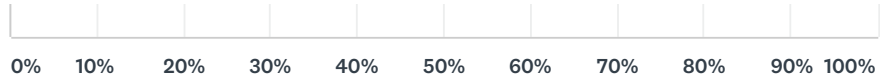
ATD Tulsa - September 28, 2018 Gamification Workshop Survey



ATD Tulsa - September 28, 2018 Gamification Workshop Survey



ATD Tulsa - September 28, 2018 Gamification Workshop Survey

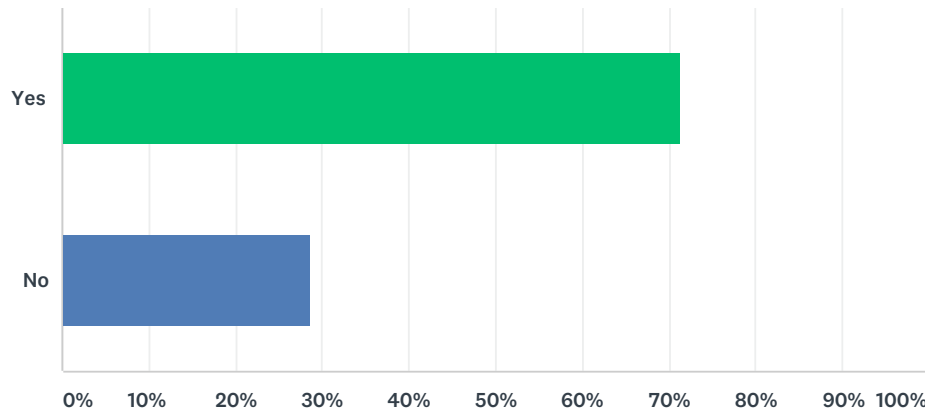


■ Excellent
 ■ Good
 ■ Fair
 ■ Poor
 ■ Terrible
 ■ Not Applicable

	EXCELLENT	GOOD	FAIR	POOR	TERRIBLE	NOT APPLICABLE	TOTAL
Beverages	0.00% 0	71.43% 5	14.29% 1	0.00% 0	0.00% 0	14.29% 1	7
Snacks	0.00% 0	71.43% 5	28.57% 2	0.00% 0	0.00% 0	0.00% 0	7
Cost for Program	14.29% 1	42.86% 3	42.86% 3	0.00% 0	0.00% 0	0.00% 0	7
Date: September 28, 2018 9-4	42.86% 3	42.86% 3	14.29% 1	0.00% 0	0.00% 0	0.00% 0	7
Location: OSU Tulsa	57.14% 4	28.57% 2	14.29% 1	0.00% 0	0.00% 0	0.00% 0	7
Lunch Meal	28.57% 2	42.86% 3	14.29% 1	0.00% 0	0.00% 0	14.29% 1	7
Online registration process	42.86% 3	42.86% 3	14.29% 1	0.00% 0	0.00% 0	0.00% 0	7
Parking	57.14% 4	28.57% 2	14.29% 1	0.00% 0	0.00% 0	0.00% 0	7
Room Setup	42.86% 3	42.86% 3	14.29% 1	0.00% 0	0.00% 0	0.00% 0	7
Room Temperature	14.29% 1	71.43% 5	0.00% 0	14.29% 1	0.00% 0	0.00% 0	7

Q5 There are 3 levels to Sententia's Gamification Program - Level 1 Apprentice, Level 2 Journeyman and Level 3 Master Craftsman. Based on your experience at this Level 1 Apprentice Gamification workshop, would you plan to attend the Level 2 Journeyman Gamification workshop if one were scheduled by ATD Tulsa?

Answered: 7 Skipped: 0



ANSWER CHOICES	RESPONSES
Yes	71.43% 5
No	28.57% 2
TOTAL	7

#	IF YOU ANSWERED NO, WHAT COULD HAVE BEEN DONE DIFFERENTLY TO CHANGE THIS TO A YES?	DATE
1	yes only as a resume builder	10/1/2018 8:32 AM

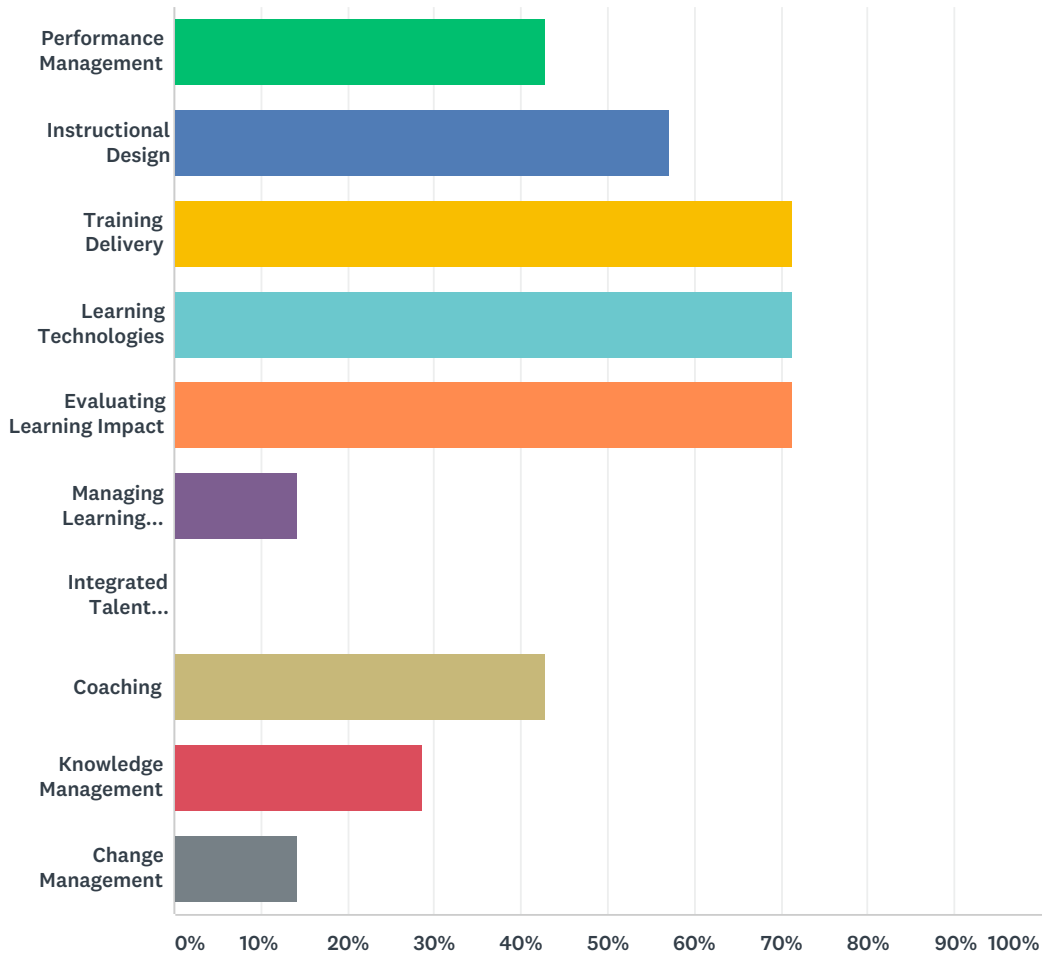
Q6 Are there speakers, companies or organizations that you would like to have present at future ATD Tulsa program meetings or workshops? If yes, please list them.

Answered: 0 Skipped: 7

#	RESPONSES	DATE
	There are no responses.	

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

Answered: 7 Skipped: 0



ANSWER CHOICES	RESPONSES	
Performance Management	42.86%	3
Instructional Design	57.14%	4
Training Delivery	71.43%	5
Learning Technologies	71.43%	5
Evaluating Learning Impact	71.43%	5
Managing Learning Programs	14.29%	1
Integrated Talent Management	0.00%	0
Coaching	42.86%	3
Knowledge Management	28.57%	2
Change Management	14.29%	1

Total Respondents: 7

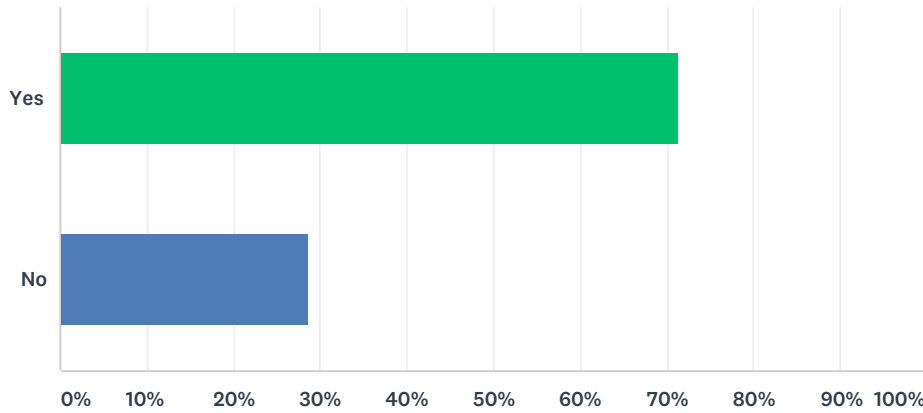
Q8 Do you have any questions, comments or concerns? (If you would like for us to respond directly, please include your preferred contact information.)

Answered: 0 Skipped: 7

#	RESPONSES	DATE
	There are no responses.	

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

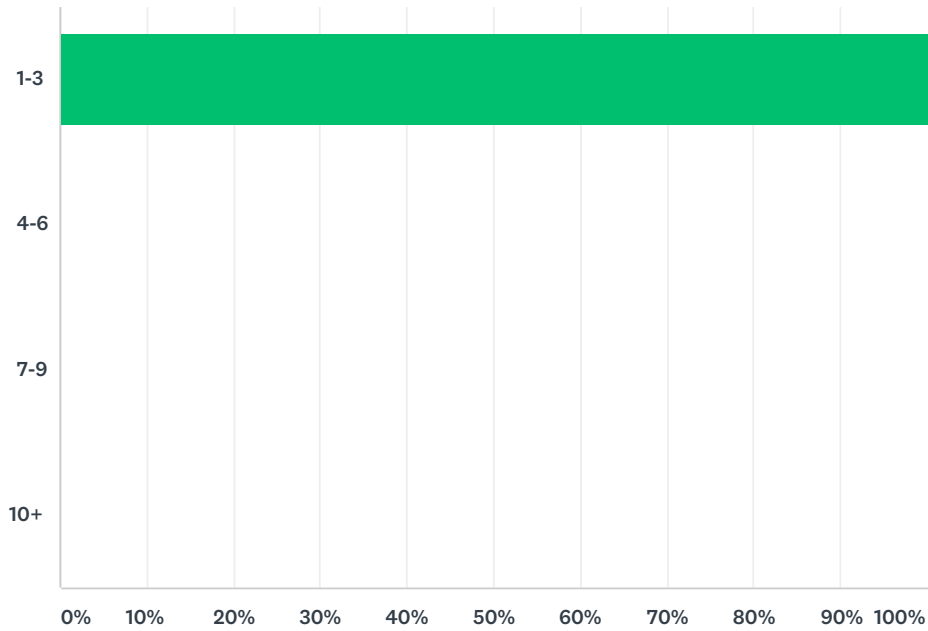
Answered: 7 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	71.43%	5
No	28.57%	2
TOTAL		7

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

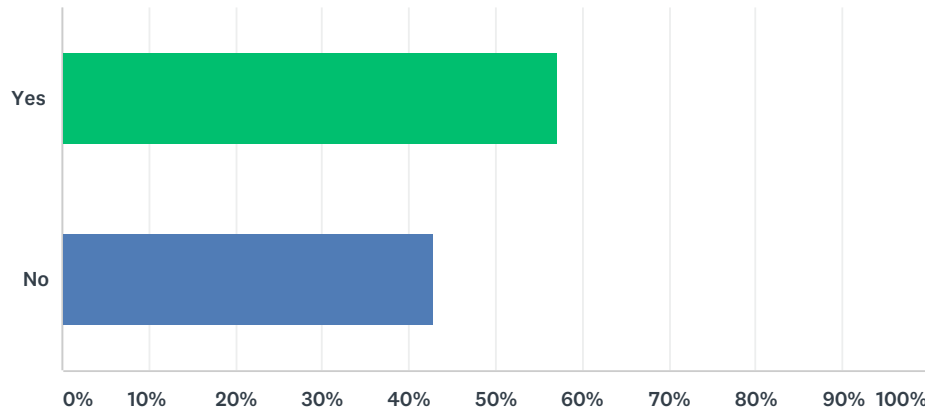
Answered: 2 Skipped: 5



ANSWER CHOICES	RESPONSES	
1-3	100.00%	2
4-6	0.00%	0
7-9	0.00%	0
10+	0.00%	0
TOTAL		2

Q11 Are you an ATD Tulsa member?

Answered: 7 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	57.14%	4
No	42.86%	3
TOTAL		7