



**CHAPTERS**  
Association for  
Talent Development

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# ATD Tulsa Chapter

## ANNUAL REPORT



# 2023

<https://TDTulsa.org>



**TULSA CHAPTER**  
Association for  
Talent Development

# 2024 Tulsa BOARD OF DIRECTORS

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## 2024 Board Members



**Kim Boggs**  
Past President



**Andrew Engelbrecht**  
President



**Crystal Ifekoya**  
President Elect



**Monika Turek**  
Vice President, Communications

# ANNUAL GOALS



Meet Care Plus Certification



Engage/Reengage Members



Increase Chapter Revenue



Increase participation and membership

# FINANCIAL REPORT

Association for Talent Development Tulsa  
Monthly Income and Expense Report - December 2023

Category Description	2023 Budget	Dec-23	Year-to-Date (YTD)	Difference (Budget - YTD)
<b>INCOME</b>				
ATD CHIP/Membership Fees/Award	\$ 2,350.00	\$ 50.00	\$ 2,149.59	\$ 200.41
Meeting Fees	\$ 8,525.00	\$ 210.00	\$ 5,925.00	\$ 2,600.00
Membership Dues	\$ 2,650.00	\$ -	\$ 1,425.00	\$ 1,225.00
ATD Meeting Sponsorship	\$ 1,500.00	\$ -	\$ -	\$ 1,500.00
ATD Newsletter Sponsorship	\$ -	\$ -	\$ -	\$ -
Special Event - Training	\$ 1,500.00	\$ -	\$ 2,275.00	\$ (775.00)
Networking Event Sponsorship	\$ -	\$ -	\$ -	\$ -
Networking Event Fees	\$ -	\$ -	\$ -	\$ -
Special Event - State Conference	\$ 15,000.00	\$ -	\$ 6,770.00	\$ 8,230.00
Special Event- State Conference Sponsorships	\$ 2,500.00	\$ -	\$ 6,500.00	\$ (4,000.00)
<b>TOTAL INCOME</b>	<b>\$ 34,025.00</b>	<b>\$ 260.00</b>	<b>\$ 25,044.59</b>	<b>\$ 8,980.41</b>
<b>EXPENSES</b>				
<b>Board Expense</b>				
National ATD Dues	\$ -	\$ -	\$ -	\$ -
Retreat	\$ 150.00	\$ -	\$ -	\$ 150.00
ATD Leader's Conference (ALC)	\$ 1,750.00	\$ -	\$ 862.05	\$ 887.95
Treasurer Expense	\$ 35.00	\$ -	\$ -	\$ 35.00
Annual Audit	\$ 2,730.00	\$ -	\$ 910.00	\$ 1,820.00
Various Board Expense	\$ -	\$ 259.87	\$ 364.83	\$ (364.83)
<b>TOTAL Board Expense</b>	<b>\$ 4,665.00</b>	<b>\$ 259.87</b>	<b>\$ 2,136.88</b>	<b>\$ 2,528.12</b>
<b>Communications Expense</b>				
GoDaddy Domains	\$ 186.30	\$ -	\$ 143.76	\$ 42.54
Go Daddy Email	\$ 770.00	\$ -	\$ 503.16	\$ 266.84
Wild Apricot Web Site	\$ 2,052.00	\$ -	\$ 2,304.00	\$ (252.00)
SurveyMonkey & Virtual Meeting Subscriptions	\$ 600.00	\$ -	\$ 635.90	\$ (35.90)
PO Box Subscription	\$ 179.40	\$ -	\$ 166.00	\$ 13.40
Marketing	\$ -	\$ -	\$ -	\$ -
<b>TOTAL Communications Expense</b>	<b>\$ 3,787.70</b>	<b>\$ -</b>	<b>\$ 3,752.82</b>	<b>\$ 34.88</b>
<b>Meeting Expense</b>				
Annual ATD Program Certification Expense	\$ 100.00	\$ -	\$ 100.00	\$ -
Facility Charge	\$ -	\$ -	\$ -	\$ -
Meals-Food	\$ 7,218.75	\$ 200.55	\$ 2,923.50	\$ 4,295.25
ATD December Special Program	\$ 250.00	\$ -	\$ -	\$ 250.00
Recognition Items	\$ 600.00	\$ -	\$ -	\$ 600.00
Special Event (Instructor Fees + Food)	\$ -	\$ -	\$ 1,387.89	\$ (1,387.89)
<b>TOTAL Meeting Expense</b>	<b>\$ 8,168.75</b>	<b>\$ 200.55</b>	<b>\$ 4,411.39</b>	<b>\$ 3,757.36</b>
<b>Membership Expense</b>				
Name Badges	\$ 100.00	\$ -	\$ 97.65	\$ 2.35
Membership Development/Appreciation	\$ 1,000.00	\$ -	\$ 357.01	\$ 642.99
New Member Appreciation/Recognition	\$ -	\$ -	\$ -	\$ -
<b>TOTAL Membership Expense</b>	<b>\$ 1,100.00</b>	<b>\$ -</b>	<b>\$ 454.66</b>	<b>\$ 645.34</b>
<b>Misc. Expenses</b>				
Online Payment Processing Expense	\$ 918.68	\$ 70.56	\$ 476.90	\$ 441.78
Oklahoma ATD State Conference	\$ 13,000.00	\$ -	\$ 4,422.59	\$ 8,577.41
Other Special Event Expense	\$ 750.00	\$ -	\$ -	\$ 750.00
Insurance	\$ 1,200.00	\$ 50.82	\$ 1,069.93	\$ 130.07
<b>TOTAL Misc Expense</b>	<b>\$ 15,868.68</b>	<b>\$ 121.38</b>	<b>\$ 5,969.42</b>	<b>\$ 9,899.26</b>
<b>TOTAL EXPENSES</b>	<b>\$ 33,590.12</b>	<b>\$ 581.80</b>	<b>\$ 16,725.17</b>	<b>\$ 16,864.95</b>
<b>OVERALL TOTAL</b>	<b>\$ 434.88</b>	<b>\$ (321.80)</b>	<b>\$ 8,319.42</b>	<b>\$ (7,884.54)</b>

Prepared by Jennifer Roberson, 2022 VP Finance on January 2, 2024

# FINANCIAL REPORT

**ATD Tulsa Chapter  
Statement of Financial Position as of December 31, 2023**

<b>Assets</b>		<b>Liabilities</b>	
Arvest Checking Account	\$ 13,548.41	Accounts Payable***	\$ -
Arvest Money Market Account	\$ 15,282.41	Taxes Payable	\$ -
Cash	\$ 47.30	<b>Total Liabilities</b>	<b>\$ -</b>
Accounts Receivable in Wild Apricot*	\$ 300.00	<b>Net Assets</b>	<b>\$ 29,178.12</b>
(Less doubtful accounts)**	\$ -	Unrestricted Net Assets	\$ 29,178.12
		Temporarily Restricted Net Assets	\$ -
		Permanently Restricted Net Assets	\$ -
<b>Total Cash Assets</b>	<b>\$ 29,178.12</b>	<b>Total Net Assets</b>	<b>\$ 29,178.12</b>
<b>Total Assets</b>	<b>\$ 29,178.12</b>	<b>Total Liabilities Plus Net Assets</b>	<b>\$ 29,178.12</b>

Prepared by Jennifer Roberson, 2023 VP Finance on December 1, 2023

\* Accounts Receivable - All are 0-60 Days

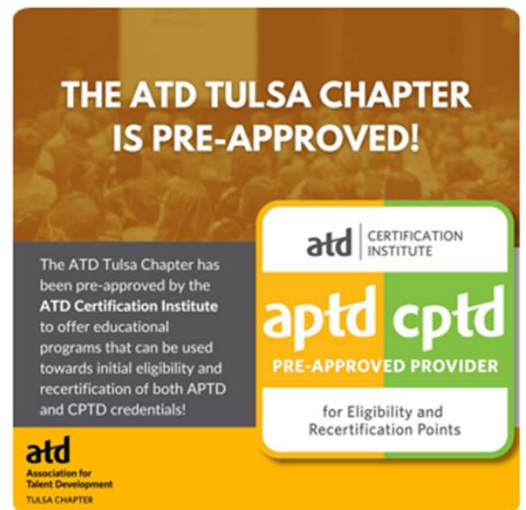
Flax Angela	\$ 90.00	0-30 days
Johnson Lynetria (Tulsa Tech)	\$ 210.00	31-60 days
	<u>\$ 300.00</u>	



# Exciting Achievements


1

[ATD Tulsa Chapter, Inc.](#) was excited to announce that we were pre-approved by the [Association for Talent Development \(ATD\)](#) Certification Institute to offer educational programs that can be used towards initial eligibility and recertification of both the Associate Professional in Talent Development (APTD) and Certified Professional in Talent Development (CPTD) credentials!



# Programming

# Professional Development



Insights from the  
**"2022 State of the Industry: Talent Development Benchmarks and Trends"**  
 by ATD Research

Presented by  
**ATD Tulsa Board**

Presented by:  
**Johnathan Peters, Sententia Gamification**

**LIVE and IN PERSON!!!**  
**(Lunch included)**

*with virtual option*

Presented by:  
**Matt Palmer**  
*Senior Director, Employee Experience and Branding at Heartland in Oklahoma City*

**LIVE and IN PERSON!!!**

**Learning By Sharing:  
 An Interactive Session for Learning Professionals**

Presented by:  
**Laurie Wofford**  
*Senior Instructional Designer, Energy Solutions*

**UNLOCKING INNOVATIVE  
 CRITICAL THINKING**



Presented by  
**Jennifer Roberson**  
*Senior Manager, Talent and Organizational Development*  
 CDOT Simons

**Friday, June 16**

Time: 11:30 AM to 1:00 PM CDT  
 Register: [www.tdtulsa.org](http://www.tdtulsa.org)

**INSIGHTS AND TIPS FROM THE ATD  
 INTERNATIONAL CONFERENCE**




Presented by  
**ATD Tulsa Members**

Join members who attended the 2023 ATD ICE conference in San Diego. They will share key takeaways and insights.

**Friday, July 21**

Time: 11:30 AM to 1:00 PM CDT  
 Register: [www.tdtulsa.org](http://www.tdtulsa.org)

**August 2023 Professional Development**

**Tips and Tools for Using Canva & AI**

Presented by:  
**Crystal Ifekoya**  
**BOSS Encounters**

**September 2023 Professional Development**

**Engaging Modern Day Learners Effectively**

Presented by:  
**Nicola Murphy**  
**Gnowbe**

**PowerPoint and AI to Create Better Presentations, Faster**



Presented by  
**Richard Goring**  
 Director, BrightCarbon

**Friday, October 13**

Time: 11:45 AM to 1:00 PM CDT  
 Register: [www.tdtulsa.org](http://www.tdtulsa.org)

**December Program Meeting**



**What I Wish I Knew Before I Became a Trainer**

Join us for a "TED Talk" style session. Hear stories from the world of training & talent development. The best advice you've ever received, funny stories, lessons learned, etc. Let's end the year on a fun note and enjoy the company of our fellow professionals!

**Friday, December 8**  
 11:30 am-1:00 pm  
 Tulsa Tech - Lemley Memorial Campus

# Programming

## Professional Development

<b>Date</b>	<b>Monthly Program Meeting</b>	<b>Attendees</b>
1/20/2023	A Review of the State of the Industry, ATD Tulsa Board of Directors	21
2/17/2023	Gamification for Talent Development: Deconstructing the Psychology of Games to Entice, Engage, and Encourage Learners by Johnathan Peters	17
4/21/2023	Why the Human Experience Matters at Work by Matt Palmer	24
5/12/2023	Learning by Sharing by Laurie Wofford	15
6/16/2023	Unlocking Innovative Critical Thinking by Jennifer Roberson	16
7/21/2023	Insights and Tips from the ATD International Conference by ATD Tulsa Membership	10
8/18/2023	Tips and Tools for Using Canva & AI by Crystal Ifekoya	19
9/15/2023	Engaging Modern Day Learners Effectively by Nicola Murphy with Gnowbe	18
10/13/2023	PowerPoint and AI to Create Better Presentations by Richard Goring	28
12/8/2023	What I wish I knew before I became a Trainer by ATD Tulsa Membership	15



# Programming Special Programing Event



The poster features a teal header with the title 'LEVEL 1 GAMIFICATION WORKSHOP' and the location 'Tulsa, OK'. A yellow starburst on the left contains the text 'Earn credits with ATD, SHRM, and HRCI'. A circular portrait of Jonathan Peters, PhD, is on the left. To the right, it says 'Presented by Jonathan Peters, PhD' and 'Chief Motivation Officer Sententia'. A teal bar at the bottom right displays the date 'Tuesday, March 7'. At the bottom, the time '8:00 AM to 4:30 PM CT' and the registration website 'www.tdtulsa.org' are listed.

**LEVEL 1 GAMIFICATION WORKSHOP**  
Tulsa, OK

Earn credits with ATD, SHRM, and HRCI

Presented by  
**Jonathan Peters, PhD**  
Chief Motivation Officer  
Sententia

**Tuesday, March 7**

Time: 8:00 AM to 4:30 PM CT  
Register: [www.tdtulsa.org](http://www.tdtulsa.org)

# 7 Attendees

# MEMBERSHIP BY THE NUMBERS

## ATD Tulsa Membership Report as of January 1, 2023

<b>Membership Level</b>	<b>#</b>
Power Member (ATD + ATD Tulsa)	44
Associate Member (ATD Tulsa only)	35
Student Power Member (ATD + ATD Tulsa)	0
Student Member (ATD Tulsa only)	2
<b>Total ATD Tulsa Membership</b>	<b>82</b>
<b>Percent Power Member</b>	<b>80%</b>

## ATD Tulsa Membership Report as of December 31, 2023

<b>Membership Level</b>	<b>#</b>
Power Member (ATD + ATD Tulsa)	49
Associate Member (ATD Tulsa only)	29
Student Power Member (ATD + ATD Tulsa)	--
Student Member (ATD Tulsa only)	1
<b>Total ATD Tulsa Membership</b>	<b>79</b>
<b>Percent Power Member</b>	<b>62%</b>

# MEMBERSHIP

## Networking Events

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15  
Attendees

### **ATD Tulsa Chapter Happy Hour**

**Thursday, March 30, 2022, 4:00 PM - 6:00 PM**

### **Cynergy Community Room**

810 S Cincinnati Ave, Tulsa, Oklahoma, US, 74119

# 2023 Oklahoma Statewide Conference

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67  
Attendees

## ATD Oklahoma Statewide Conference 2023



## Driving Transformation

Empowering Change to Unlock Success | November 9, 2023

### Location:

Tulsa Technology Center - Lemley Memorial Campus  
Client Service Center



Thank you for reading our ATD  
Tulsa 2023 Annual Report!

If you have any comments or  
questions, contact Kim Boggs,  
Past President at past-  
president@tdtulsa.org or  
918-289-7138.