ROCKY MOUNTAIN CHAPTER
Association for
Talent Development

2017 Annual Report

Submitted by
Yvonne Bogard, President

ATD RMC 2017 Annual CARE Report

January 18, 2018

Table of Contents

President's Letter

Dear ATD Rocky Mountain Chapter Members,

ATD Rocky Mountain Chapter proudly presents you with the 2017 Annual Report. ATD Rocky Mountain Chapter produces an Annual Report for our membership as part of the annual Chapter Affiliation Requirements (CARE) for national ATD. This President's Letter is a brief highlight of the Rocky Mountain Chapter recognitions, initiatives, partnerships, and sponsorships for the 2017 operating year. 2017 marked yet another successful year for ATD-RMC, with some outstanding accolades and new initiatives to share.

ATD Awards and Recognition
Rocky Mountain Chapter has been honored and recognized for the following awards.

- **Maintained 100% compliance** - for Chapter Affiliation Requirements (CARE). The CARE requirements are a set of performance guidelines designed to help chapters deliver consistent benefits to members.

- **Power membership award** – 2nd place, medium sized chapter – joint membership of 57%

- **Membership Super Star Chapter award** - for meeting all CARE requirements, and having more than 45% of our chapter members be joint members with ATD National.

- **Sharing Our Success (SOS)** - transitioned the chapter's email from GoDaddy to G-Suite for Nonprofits. In addition to new email service, the move to G-Suite provides the Board of Directors with a robust offering of Google Apps that allow for successful collaboration from anywhere. G-Suite for Nonprofits is a free service offered by Google and will allow the chapter more funds to invest in members.

Community Engagement
Sue Fody serves in the new board role, VP Community Engagement. She transitioned from VP Volunteer Engagement to expand the chapter's engagement with members and outreach to the Denver metro community-at-large. Sue continues oversight of volunteers with the support of the new Director of Volunteer Engagement role lead by Jeannie Clinkenbeard.

Sue leads a three-pronged approach to community engagement which includes the Executive Advisory Council, Consultant Directory, and Student Members.

1. **Executive Advisory Council**
   We began a new initiative in order to provide Rocky Mountain Chapter with strategic guidance on local trends and issues relevant to our members. This cross-organizational working group makes recommendations to the chapter's Board of Directors, while building value for their organizations and practitioners. A call for nominations yielded a skilled and experience team of applicants. These 11 highly respected professional from the Denver metro talent development community form the council and serve a two year

volunteer term. For more information, see https://www.atdrmc.org/Executive-Advisory-Council.

2. **Consultant Directory**
   We implemented a Consultant Directory to provide another way of adding value to our members who are small business consultants. Initially we are providing a searchable database populated for and by chapter membership. The directory is currently in a forming stage. Ginger Nichols, the VP Technology, was instrumental in creating this profile and functionality on the chapter's website.

3. **Student Members**
   Another new initiative for the chapter is to find way to engage student members. Dena Rezai, a recent new member and current student, serves as the Student Liaison. Dena and Sue Fody, VP Community Engagement, presented information to a local university's undergraduate class about the value and benefits of ATD and local chapter membership. We anticipate an expansion of these types of activities and adding a student mentorship program in the near future.

Sponsorships
Led by Shawn Evans, VP Sponsorship, the chapter sponsored Disrupt HR – Denver for the first time this year. This event was an important networking opportunity to build awareness of the ATD brand, discuss similarities with HR talent development and the ATD Competency Model, and build our local chapter outreach.

Partnerships
Rocky Mountain Chapter actively engages with other ATD chapters and local professional organizations. For example, we have continued our collaboration by:
- Co-hosting the CPLP virtual study groups with five ATD chapters: Piedmont (co-founding study group), West Virginia, Valley of the Sun, Suncoast, and Austin.
- Sharing of resources with the Colorado Chapters: Pikes Peak and Northern Rockies.
- Networking with the International Coach Federation-Colorado (ICF CO) Chapter to cross-promote our events. See http://www.icfcolorado.org/content.aspx?page_id=22&club_id=994813&module_id=262263.
- Working toward 2018 networking partnership with the Society for Human Resource Management (SHRM) in the Denver metro area, in particular the Mile High Chapter.

Thank you to our members, our community, and the dedication of our volunteers and our board of directors; your participation has been invaluable in making all of these awards and initiatives possible. As part of the ATD CARE requirement to distribute an Annual Report for our members, I submit the following 2017 Annual Report.

Respectfully,

Yvonne Bogard, CPLP
President 2017
ATD Rocky Mountain Chapter

Board of Directors 2017

Yvonne Bogard, CPLP, President

Robin Doss, Past President

Jean Eckhoff, President Elect & Vice President Programming

Shawn Evans, Vice President of Sponsorships

Sue Fody, Vice President Community Engagement

Stephanie Lang, Vice President Communications & Social Media

Ginger Nichols, Vice President Technology

Eric Savickas, Vice President of Membership

Lisa Vallad, CPLP, CPA, Vice President Finance

Shannon Wzientek, CPLP, Vice President of CPLP Study Groups

Chapter Administrator
Ann Baus

Directors & Leaders
Jeannie Clinkenbeard, Director of Volunteer Engagement

Dena Fatemeh Rezaei, Student Liaison

Board of Directors Report

Yvonne Bogard, President

2017 Plan
The 2017 strategy was to build brand awareness of and differentiate ATD Rocky Mountain Chapter from other local professional organizations such as Society for Human Resource Management (SHRM) and International Coaching Federation (ICF) Colorado. We focused on why people should join and attend the chapter's monthly meetings. Further, we emphasized with whom members and attendees would have the opportunity to network with at events.

We implemented a new initiative by establishing an Executive Advisory Council (EAC). This initiative goal was to reach out to, and gain insights from the local talent development leaders within our community. The objective was to have a positive impact on the chapter's strategic planning and programming in order to better meet the needs of our members and community. We inducted our first EAC cohort this year and held quarterly meetings beginning in May. The most significant outcome for 2017 was a list of project topics for council members to eventually work on collaboratively in 2018.

ATD Awards and Recognition
Rocky Mountain Chapter continues to be recognized as an award-winning chapter and was recognized for the following awards in 2017.

Maintained 100% compliance - for Chapter Affiliation Requirements (CARE). The CARE requirements are a set of performance guidelines designed to help chapters deliver consistent benefits to members. CARE consists of elements in five key areas that are necessary for running an ATD chapter like a business:
   1. administration
   2. financial
   3. membership
   4. professional development
   5. communication

Power membership award – 2nd place, medium sized chapter – joint membership of 57%

Membership Super Star Chapter award - for meeting all CARE requirements, and having more than 45% of our chapter members be joint members with ATD National.

Sharing Our Success (SOS) - transitioned the chapter's email from GoDaddy to G-Suite for Nonprofits. In addition to new email service, the move to G-Suite provides the chapter Board with a robust offering of Google Apps that allow for successful collaboration from anywhere. G-Suite for Nonprofits is a free service offered by Google and will allow the chapter more funds to invest in members.

ChIP Revenue

CHIP revenue (Chapter Incentive Program) for 2017 was $6,193, which is a decline from 2016 by 25%. However, 2016 was an exceptional year for ChIP revenue due to the International Conference and Exposition (ICE) being hosted in Denver. The increase in ChIP revenue is always true for the hosting chapter for ICE. For example, ICE was hosted by the Atlanta chapter in 2017 and they were recognized for the highest ChIP revenue this year. The good news is that ICE will be hosted in Denver again in 2020.

When comparing 2017 ChIP Revenue to 2015 ChIP Revenue, the chapter is still showing a **two-year increase of 255%**. ChIP revenue is generated through our chapter members entering our CHIP number of CH6046 when purchasing ATD materials, publications, and attending ATD trainings such as Master level, Essentials, and certificate programs.

Thank you for remembering your chapter and helping us with this additional revenue. It has allowed us to increase programming and offer more discounts, incentives, and gifts to our membership.

2017 Major Accomplishments
- Engaged new and potential members with quarterly meet-and-greet programs for community outreach while expanding awareness of the local ATD chapter.
- Expanded leadership opportunities for volunteers to support and engage with the chapter membership.
- Provided programming based on member feedback, which aligned with ATD Competency Model.
- Established the Executive Advisory Council with quarterly meetings.
- Grew the number of CPLPs serving in Board leadership roles from one to four.
- Increased chapter brand awareness through strategic sponsorships.
- Grew sponsorship cash revenue from $325 in FY2016 to $1,650 in FY2017. Sponsors included Panopto (Gold Sponsor), Powers Resource Center (Gold Sponsor) and Collaborative Action (Advertising).
- In-kind services and venue sponsorship was estimated to be over $2500 from Tier1 Performance, Powers Resource Center, Four Winds, West Metro Fire Protection District, and Daniel's Fund.

We began the year with a full Board of Directors and experienced minimal turnover of two board members during the first half of the year. The Rocky Mountain Chapter's Board of Directors are an exceptional group of professionals. The synergy amongst the Board members reflected strong leadership impact for members and volunteer engagement. These volunteer leaders were "grown" from within the very active volunteer pool which continues to be an excellent resource to draw from.

President Elect
Lisa Vallad, CPLP, CPA will serve as President Elect beginning July 1, 2018. Until then she is serving as VP Finance. She will recruit and onboard her replacement as VP Finance during the second half of 2018.

Past President
Robin Doss, Past President, added a new bundle of joy to her family in January. Michele Padilla, the 2016 Past President, stepped in to serve as Past President for first quarter while Robin was on maternity leave. We thank her for her exemplary support.

Membership
The fourth quarter joint membership of Power Members was 63%, well above the CARE requirement. Membership levels remained consistent throughout 2017, averaging 200 active members (+/- 10) in any given month. The chapter did well to attract 88 new members this year, but unfortunately 90 memberships lapsed.

Programming
Jean Eckhoff stepped up to serve in a dual role during 2017 as VP Programming and President Elect. Jean brought a fresh perspective for the chapter's programming and implemented many fresh ideas that were well received. For example, she collaborated and coordinated shared virtual programs with Pikes Peak Chapter. As she was transitioning to President role for 2018, she onboarded the new VP Programming for 2018, Ivelise Zambrano-Hererra, CPLP, for a seamless transition. Ivelise has already lined up three exciting programs for first quarter 2018.

CPLP Study Groups
Shannon Wzientek, CPLP led the CPLP Study Groups to a new level of success as VP CPLP Study Groups. She added a third cohort for 2017, the largest effort to date. Further, she added the Skills Application Exam (SAE) to the content covered. She plans further expansion for the SAE in 2018.

Facilitator's Exchange Special Interest Group (SIG)
Eunice Shankland led a collaborative leadership team to reboot the Facilitator's Exchange SIG. The team put together a strategic plan and held four well-attended quarterly sessions. The team has plans in the works to continue this growing special interest group for the chapter.

Communications & Social Media
Stephanie Lang served the chapter well as VP Communications & Social Media. She streamlined the chapter communications with a consistent ATD branding style and strategic social media marking techniques. The monthly newsletters focused on volunteerism, the President's Message, Power Membership, and chapter news updates. Stephanie continued to use HootSuite to make chapter promotions and communications more often to reach a wider audience. We have also continued to stay in touch with our membership through the use of LinkedIn, Facebook and Twitter and have used these social media platforms for more event and program marketing. Stephanie is stepping down for 2018 but has onboarded Lisa Gillard as her replacement.

Finance
Lisa Vallad, CPLP, CPA made the transition to serve as the new VP of Finance in February. The former VP, Megan Flori, resigned due to increasing responsibilities at work. Lisa and Megan worked together to make the transition very smooth and without incident. Lisa provided monthly financial reports, filed federal tax return, and executed the annual external audit. Further, she helped all of us keep on track and made certain everyone provided receipts. Lisa

improved the process of keeping receipts attached to the online records using QuickBooks, the online financial management software. She provided invaluable support to the Board for decision making based on the budget.

Sponsorships
Shawn Evans, VP Sponsorships, increased the number of sponsorships and built brand awareness with his outreach efforts. He managed new vendors and increased meeting venues for in-kind sponsorships. Shawn positioned the chapter to be a significant sponsor of the 2017 Disrupt HR – Denver in March. For this event, the Board agreed to offer free vouchers to attend one chapter event during 2017. We tracked these vouchers for the remaining 2017 events found that the return on our investment was significant enough to consider sponsoring this event again in 2018. This outward focused sponsorship led to many new networking connections.

Community Outreach
Sue Fody transitioned into the expanded role of VP Community Engagement in May since the previous VP resigned. This crucial Board role was expanded to include a three pronged approach: 1) Executive Advisory Council, 2) Consultant Directory, and 3) Student Outreach. The Board restructured Sue's previous role as VP of Volunteer Engagement to be a Director role reporting to VP Community Outreach.

Director of Volunteer Engagement
Jeannie Clinkenbeard joined the leadership team in May as Director of Volunteer Engagements We restructured Volunteer Engagement to be a Director role reporting to VP of Community Engagement. This Director role is not a voting member of the Board.

Student Liaison
Dena Fatemeh Rezaei joined the leadership team as Student Liaison report to VP of Community Engagement. This vital role supports the broadened scope for Community Engagement.

Technology
Ginger Nichols served as the new VP of Technology. Under her leadership and exceptional technical skills, she implemented G-Suites to meet the communication needs of the chapter. She updated the chapter's website with a new look and easier navigation for our membership.

Chapter Administrator
Ann Baus joined us as our new virtual Chapter Administrator in September. The former virtual Chapter Administrator since 2013, Glenda Hinz, decided to semi-retire September 30, 2017. Ann and Glenda made a transition plan which made this change very successful. Ann came very highly recommended and with a great deal of ATD experience as she supports other chapters. Ann is not only a delight to work with, she has provided numerous insights and suggestions on ways to save the chapter money and make our processes more streamlined and efficient. We are so pleased to have Ann join us as our virtual Chapter Administrator.

Finance Report

Submitted by Lisa Vallad, CPLP, CPA, VP of Finance

Financially, we had a successful year though we had a net loss of $368 at year-end, December 31, 2017. This loss was due to the Board of Directors investing in sponsoring an external conference, DisruptHR DENVER 2017, at a cost of $1,032 to build chapter awareness and potentially generate additional membership. We did build chapter awareness with 16 people, who attended this event and received a coupon for one free meeting during 2017, whom attended chapter meetings.

Highlights
- Our cash balance remained consistent from 2016.
- We conducted an audit of all of our subscription services to ensure that we were getting a non-profit rate on all subscriptions. This will result in an annual savings of ~ $1,000.
- We continue to use Quickbooks as our online financial management software.

ChIP Revenue
Chapter Incentive Program (ChIP) revenue for 2017 was $6,193, which is a decline from 2016 by 25%. However, 2016 was an exceptional year for CHIP Revenue. When comparing 2017 ChIP revenue to 2015 ChIP revenue, **the chapter is still showing a two-year increase of 255%.** ChIP revenue is generated through our chapter members entering our ChIP number of CH6046 when purchasing ATD materials, resources or attending ATD trainings.

Balance Sheet

Association for Talent Development - Rocky Mountain Chapter

BALANCE SHEET

As of January 1, 2018

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
First Bank Checking	17,250.18
FirstBank Savings	14,441.96
Total Bank Accounts	**$31,692.14**
Accounts Receivable	
Accounts Receivable	0.00
Total Accounts Receivable	**$0.00**
Other Current Assets	
Credit Card Receivables	539.67
Prepaid Expenses	0.00
Prepaid Communication Expenses	0.00
Prepaid Program Expenses	0.00
Prepaid Technology Expenses	282.99
Total Prepaid Expenses	**282.99**
Undeposited Funds	0.00
Total Other Current Assets	**$822.66**
Total Current Assets	**$32,514.80**
TOTAL ASSETS	**$32,514.80**
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable	0.00
Total Accounts Payable	**$0.00**
Other Current Liabilities	
Other Current Liabilities	803.22
Total Other Current Liabilities	**$803.22**
Total Current Liabilities	**$803.22**
Total Liabilities	**$803.22**
Equity	
Opening Bal Equity	0.00
Retained Earnings	31,711.58
Retained Earnings*OE	0.00
Net Income	
Total Equity	**$31,711.58**
TOTAL LIABILITIES AND EQUITY	**$32,514.80**

Profit and Loss

Association for Talent Development - Rocky Mountain Chapter

PROFIT AND LOSS

January - December 2017

	TOTAL
Income	
4000 Membership Income	
4010 Membership Dues	13,275.50
4020 Dues Paid to National	-2,026.00
Total 4000 Membership Income	11,249.50
4400 Chapter Income	
4410 CHIPS	6,193.12
4440 Sponsors	1,650.00
4490 Interest Inc	1.43
Total 4400 Chapter Income	7,844.55
4500 Program Income	
4510 Monthly Program Income	5,483.40
4520 Webinars	244.00
4530 CPLP Virtual Study Group	160.00
4540 Facilitators Exchange	359.49
Total 4500 Program Income	6,246.89
Total Income	**$25,340.94**
GROSS PROFIT	**$25,340.94**
Expenses	
5100 Prog Exp	
5110 Facility and Food/Beverage	7,958.02
5125 Speaker Hotel, Food, Taxi, etc	325.84
5130 Techology - Programs	599.66
5140 Printing-Programs	111.49
5145 Program Gifts	50.00
5175 New Membership Events	232.63
5180 Executive Advisory Council	1,277.23
5195 Program - Misc/Other	66.86
Total 5100 Prog Exp	10,621.73
5200 Board Expenses	
5205 Board Exp	907.31
5210 BOD Meet'g/Recog.	576.79
5230 Leadership Conf	4,309.55
Total 5200 Board Expenses	5,793.65
5500 Operating Expenses	
5520 Communications	1,047.79
5525 Marketing	610.62
5530 Permits and Fees	20.00
5540 Postage	147.40
5545 Printing	251.74
5550 Insurance	1,060.12
5570 Software/Subscrp Fees	497.54
5575 Supplies	83.72

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	TOTAL
5580 Tax Return Preparation	250.00
5585 Sponsor Expenses	1,032.00
5590 Management Fee	1,661.33
5592 Technology Expense	1,264.72
5593 Travel	92.02
5595 Bank/CC fees	1,275.52
Uncategorized Expense	0.00
Total 5500 Operating Expenses	9,294.52
Total Expenses	**$25,709.90**
NET OPERATING INCOME	**$ -368.96**
NET INCOME	**$ -368.96**

Membership Report

Submitted by Eric Savickas, Vice President of Membership

Membership levels remained consistent throughout 2017, averaging 200 active members (+/-10) in any given month. The chapter did well to attract 88 new members this year, but unfortunately, we lost 90 members who chose not to renew their memberships. We investigated and found various causes for the attrition in membership surveys and conversations, and began implementing plans to increase retention. A major initiative started in 2017 is a shift to an "all-inclusive" membership model.

Membership activity from January 1 - December 31, 2017:

Active members (as of January 1, 2017)	193
Members lapsed, not renewed	(90)
New members	88
Active members (as of December 31, 2017)	191

The membership functional activity executed along three primary Lines of Operation (LOEs) this year. The LOEs were: Increasing Membership, Conducting Retention Activities, and Ensuring CARE Compliance.

Increasing Membership
While the chapter did not conduct a major annual membership drive this year, we executed numerous smaller efforts focused on attracting new members. One highlight of these efforts was a chapter sponsorship of an event called Disrupt HR where we increased our visibility to an audience of approximately 350 HR professionals. Additionally, we planned and executed three free new member happy hour events where non-members could learn about the chapter and meet some of the board members in a casual, friendly environment.

Retention Activities
- **After Action Reviews:** The chapter conducted thorough After Action Reviews (AARs) at board meetings after all planned activities to identify improvements for future events. We also conducted post-event surveys with all attendees and a comprehensive annual survey for all members. This collection of data helped drive our focus on member desires when developing initiatives and allowed for "retention" to occur without any arm twisting or convincing.
- **"All-Inclusive" Membership Implementation:** One major outcome of the surveys and AARs was an initiative to convert our membership pricing model from one with annual dues plus additional fees for each event to an "all-inclusive" membership with a single annual cost. The new model will go into effect on January 1, 2018 and the chapter will be 100% transitioned by December 31, 2018.

CARE Compliance
For CARE requirement 3.1, the chapter conducted its comprehensive annual member survey from September through October 2017. The survey was more detailed than in

previous years, focusing on demographic information, member satisfaction, programming preferences, and chapter communications. The survey garnered 60 responses which will help shape future planning activities. For CARE requirement 3.2, the chapter ended 2017 with 63% Power Member rate which exceeds the 35% required goal. Additionally, we have consistently executed the three foundational joint membership activities and more than the 10 required additional activities.

While we have made positive improvements in the membership function for 2017, we recognize that more work needs to be done. The relationship between recruiting and retention must be explored further to ensure we don't continue to trade each new member for current members who choose not to renew. We look forward to addressing this more, assessing the changes caused by the new membership model, and continuing our improvement in 2018!

ATD RMC 2017 Annual CARE Report

January 18, 2018

Programming Report

Submitted by Jean Eckhoff, VP Programming

Jean served in a dual role as VP Programming and for the second half of 2017 also served as President Elect. The chapter delivered an impactful and well-attended professional development line-up of programming with a minimum of one event every month of the year. We hosted a wide variety of speakers, held several productive networking events, and hosted a joint informational event with International Coach Federation – Colorado Chapter. We selected our topics based on the 2016 annual survey on members' areas of professional development interest. This tactic paid dividends with an average attendance at our monthly programs of 26 people and an average 9.2 NPS (Net Promoter Score – see https://en.wikipedia.org/wiki/Net_Promoter) out of 10.

CHAPTER MEETING	NPS SCORE	SURVEY RESPONSE RATE	# ATTENDEES	ranking by # of attendees
DEC - HOLIDAY NETWORKING LUNCHEON - cancelled				
NOV - AGILE MINDSET	9.3	67%	21	7
OCT - EXECUTING CHANGE	9.0	67%	15	9
SEP - MOVED BY MESSAGE	9.3	39%	23	6
SEP - NETWORKING BASH	9.4	21%	47	1
AUG -BLENDED LEARNING	9.3	21%	14	10
JUN - NETWORKING AT THE ART HOTEL	8.7	24%	29	3
MAY - CONSCIOUS HIRING	9.5	17%	24	5
APR - TECHNOLOGY ROUNDUP WITH TOTH	9.3	17%	18	8
MAR - ENERGY INTELLIGENCE	9.7	48%	25	4
FEB - LEARNING CIRCLES	9.5	47%	36	2
JAN - SIP AND DRAW	8.6	24%	29	3
Average NPS	**9.2**			

ATD RMC 2017 Annual CARE Report

January 18, 2018

ROCKY MOUNTAIN CHAPTER
atd Association for
Talent Development

Summary of Programming

Total number of programming events	65
Chapter meetings and networking events*	11
Welcome New and Potential New Members: Meet-and-Greet **	3
Virtual Programs***	11
Facilitator's Exchange Special Interest Group (SIG)	4
CPLP Virtual Study Group cohorts (3 cohorts x 13 sessions each – first week is an introductory session)	36

Our 2017 programming included topics such as conscious hiring, graphically designing your presentation, executing change that sticks, storytelling in the workplace to build culture and developing an agile mindset. Our highest-attended programs outside of our networking events were on learning circles, storytelling (telling your organization's story), conscious hiring, and graphically designing your presentation. In addition to our chapter meetings, we offered a variety of webinars with topics ranging from eLearning best practices to blended learning.

*Chapter Meetings, Networking Event & Meet and Greets

	Date	#	Speaker	Program Title	Expenses	Revenue	ATD Competency
1	January 19	29	Sue Fody, GOT IT! earning Designs	Sip & Draw: Graphically Designing Your Presentation	$525.82	$960.00	Training Delivery / Presentation Skills
2	February 28	36	Joel Lamoreaux, DeLuxe	Learning Circles: A Back to the Basics Approach to Leadership Development	$664.20	$710.00	Business Skills: Leadership Development
3	March 23	25	Josh Dykstra, Strength Scope	Energy Intelligence: What We Are Missing About The Science Of Strengths	$583.95	$705.00	Integrated Talent Management
4	April 11		none	**New Member Meet and Greet	$101.57	$0.00	Personal/Business Skills
5	April 20	18	Thomas Toth, dWeb Studios	Technology Roundup with Thomas Toth	$486.32	$860.00	Learning Technologies / Training Delivery / Technology Literacy
6	May 17	25	Margaret Graziano, Keen Alignment	Conscious Hiring	$577.80	$530.00	Integrated Talent Management

ATD RMC 2017 Annual CARE Report

January 18, 2018

7	June 21	29	none	Networking	$810.32	$670.00	Personal/Business Skills
8	August 15		none	**New Member Meet and Greet	$34.45	$0.00	Personal/Business Skills
9	August 17	14	Diane Senffer, Cine Learning Productions	Part 2: Blended Learning – Using Multi-Media to Transform your Learning and Get Results [Part 1 previously - webinar on July 26th: Introduction to Blended Learning: Using Stories and Narratives to Transform your Learning and Get Results]	$280.00	$410.00	Instructional Design / Training Delivery / Learning Technologies / Managing Learning Programs
10	September 6	47	none	Networking. Partner event with ICF & Professional headshots with Thomas Toth	$1,396.80	$950.00	Personal/Business Skills
11	September 28	23	Ryan Osmond, Rylentless	Moved by the Message: Storytelling in the Corporate Environment	$613.50	$0.00	Integrated Talent Management | Managing Learning Programs
12	October 19	15	Susan Mitnick, Four Winds Interactive	Executing Change that Sticks	$743.90	$360.00	Change Management | Performance Improvement
13	November 16	21	Dr. Casey Mulqueen, Tracom	Developing an Agile Mindset	$610.00	$480.00	Performance Improvement
14	December 5	18	none	**New Member Meet and Greet (approx. cost)	$96.61	$0.00	Personal/Business Skills
	TOTAL				$7,525.24	$6,635.00	

ATD RMC 2017 Annual CARE Report

January 18, 2018

atd ROCKY MOUNTAIN CHAPTER
Association for
Talent Development

***Virtual Programs

	Date	#	Speaker	Program Title	Expenses	Revenue	ATD Competency
1	February 17	n/a	hosted by Pikes Peak, http://tdpikespeak.org/event-2440995	Enhance Your Training and Facilitation Skills	$0	$0	Training Delivery
2	March 14	n/a	Connie Malamed – hosted by Pikes Peak http://tdpikespeak.org/event-2442558	Crash Course in Visual Design	$0	$0	Learning Technologies & Instructional Design
3	April 19	19	Christy Tucker, Syniad Learning	Scenario Based Learning	$0	$40	Instructional Design & Training Delivery
4	May 2	n/a	Gallup - hosted by Central Florida https://tdcentralflorida.org/event-2495397/Registration	State of the American Workforce	$0	$0	Integrated Talent Management
5	May 11	10	Matt Walsh, Cinecraft Productions	An Open and Shut Immersive Learning Strategy	$0	$10	Instructional Design & Training Delivery
6	May 24	n/a	Bob Hancox & Dan Rockwell – hosted by Pikes Peak, http://tdpikespeak.org/event-2442526	Coaching and Leadership Development	$0	$0	Coaching & Integrated Talent Management
7	June 15	14	Robert Van Hyfte, The Judge Group	Managing eLearning	$0	$30	Managing Learning Programs
8	July 26	8	Diane Senffer	Introduction to Blended Learning: Using Stories and Narratives to Transform your Learning and Get Results	$0	$40	Instructional Design & Training Delivery
9	October 25	n/a	Todd Davis, Franklin Covey - hosted by Pikes Peak, http://tdpikespeak.org/event-2665524	Get Better: 15 Proven Practices to Build Effective Relationships at Work	$0	$0	Performance Improvement
10	November 9	n/a	Sheri Jeavons, Power	Develop and Deliver Technical	$0	$0	Training Delivery

			Presentations – hosted by Pikes Peak, http://tdpikespeak.org/event-2588494	Presentations that Get Results			
11	November 29	n/a	Matthew Pierce, TechSmith – hosted by Pikes Peak, http://tdpikespeak.org/event-2665024	Ready! Set! Go! Video and Audio Production	$0	$0	Learning Technologies
	Totals	51			$0	$120	

One unexpected yet outstanding outcome from members who have attended our chapter meetings is that CultureLabX reached out to the chapter explore the possibility of collaborating in 2018 to offer a workshop/conference on workplace culture. Other strategic partnerships in the works are collaborating with the Denver chapter of the Society of Human Resource Management (SHRM), and Tracom, a strategic 'social intelligence' consulting organization.

Our networking events validated that our members look to ATD RMC as one of their preferred venues to make professional connections and expand their network. We were very proud of the joint effort with ICF Colorado as a means to connect professionals; it was the highest attended with 47 members joining us. Many of our members created valuable new connections with individuals at these networking events.

Finally, to drive our increased focus on new members, we participated in the Disrupt HR event in August 2017. As a preferred sponsor, we were able to give a short 'pitch' in front of all the attendees to explain the value of joining ATDRMC. Our booth saw a lot of 'traffic' and, by offering a code to attend one of our chapter meetings for free, we were able to gain new attendees and members for our chapter.

For 2017, the annual members' survey reflected interest in professional development around ATD's communities of practice and were ranked as follows.

2017 Rank	Area of Practice	Month Addressed
1	Training delivery	Jan	Apr	Aug
2	Integrated talent management (organizational development)	Mar	May	Sep	Oct
3	Learning technologies	Apr	Aug
3	Technology literacy	Apr	Aug
3	Instructional design	Aug
3	Skills: business (leadership skills), interpersonal	Feb
4	Performance Improvement (employee engagement)	Oct	Nov
5	Managing learning programs (needs assessment)	Aug	Sep

6	Change management	Oct | Nov
7	Knowledge management	
8	Coaching	
9	Evaluating learning impact	Oct | Nov
10	Global mindset	
11	Industry knowledge	

CPLP Study Groups Report

Submitted by Shannon Wzientek, VP of CPLP Study Groups

In 2017, the Rocky Mountain Chapter administered and led three CPLP virtual study group cohorts, focused on preparing CPLP candidates for the Knowledge Exam. See details below.

	Cohort	Number of Participants	Revenue* $50 per non-cohosting chapter members	Revenue Sharing Paid Out (per co-hosting chapter)	Net Revenue – Rocky Mountain Chapter	Co-Facilitating Chapters
1	2017 Winter Spring A total of 13 sessions from January to March	16	$550	$110 x 4 = $440	$110	1. Rocky Mountain 2. Piedmont 3. West Virginia 4. Valley of the Sun 5. Suncoast
2	2017 Spring Summer A total of 13 sessions from March to June	11	$200	$40 x 4 = $160	$40	1. Rocky Mountain 2. Piedmont 3. West Virginia 4. Valley of the Sun 5. Suncoast
3	2017 Summer Fall A total of 13 sessions from July to October	9	$450	$90 x 4 = $360	$90	1. Rocky Mountain 2. Piedmont 3. Austin (new) 4. Valley of the Sun 5. Suncoast
	Totals	36	$1200	$660	$240	6 co-hosting chapters
	Zoom conferencing tool				$99	
	2017 Net Revenue				$141	

Red type shows chapters who weren't able to participate for a particular cohort or joined as a co-hosting chapter.
*Members of co-hosting chapters attend/participate for free as a member benefit, and may join any subsequent cohort for free as well.

Additionally, a study session focused on the Skills Application Exam was delivered by the Rocky Mountain Chapter upon conclusion of each cohort at no additional cost, and there are plans to expand these efforts in 2018.

Interest from other chapters continues to increase, with participants being located across the country and even internationally from India and Ireland. Additionally, other chapters have partnered with the Rocky Mountain chapter to assist with the facilitation efforts, resulting in waived participation fees for their members as well. The Central Florida Chapter will also join the list of co-facilitating chapters for 2018.

The study group has created a CPLP community, which has fostered collaboration, networking, and ongoing relationships. Study group participants continue to keep all involved in their cohort's abreast of their accomplishments. To date, four 2017 participants have earned their CPLPs and five others have passed the Knowledge Exam and are either preparing for the Skills Application Exam or are awaiting their results of the Skills Application Exam.

Shannon Wzientek and Chapter President Yvonne Bogard presented with fellow Suncoast study group co-host, Lori Ann Roth, at the 2017 All Leaders Conference (ALC) to share the results and processes of the study group to other chapters. This generated additional interest for a face-to-face model and the virtual model.

Other chapters continue to reach out seeking guidance pertaining to the study group and/or with an interest in becoming involved. This has created partnerships across many chapters and growth continues to be seen. The Rocky Mountain Chapter looks forward to offering two cohorts in 2018 as well as implementing a group model for the Skills Application Exam preparation.

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Facilitator's Exchange SIG Report

Submitted by Eunice Shankland, Facilitator's Exchange Coordinator

With the encouragement and support of Robin Doss, Yvonne Bogard and Dana Sednek-Bowler along with members of the team, Erin O'Toole Murphy, Sherwood Shankland, and Nadine Lund; the Facilitators Exchange Special Interest Group (SIG) restarted/rebooted in 2017. Additional support was provided by Ginger Nichols, Webmaster, Stephanie Lang, Communications and Glenda Hinz, Chapter Administrator to guide the SIG throughout the year.

The Facilitator's Exchange leadership team consisted of Eunice Shankland, Nadine Lund and Sherwood Shankland.

There were four events as listed below with a total of 57 participants and net revenue of $400.00. This year included of robust exchange of ideas, techniques, resources and full of enthusiastic dialogue.

2017 Dates	Speaker(s)	Program Title	Registrants	Total Monthly Expenses	Total Monthly Revenue
April 12	Eunice Shankland	Launch Session with exchanges on *Facilitation, Adaptive Learning* and a list of resources	17	$37.50	$170.00
July 18	Erin Murphy, Sarah Buller	Designing Facilitation that Serves the Client	12	$37.50	$120.00
August 29	Nancy Lee Ashworth, Ann Epps	Exploring Multiple Paths to Breakthrough Thinking	15	$37.50	$150.00
November 14	Sue Fody, Lydia Hooper	USING VISUALS: TOOLS FOR TRAINERS AND FACILITATORS	13	$37.50	$110.00
				$150.00	$550.00
		2017 Net Revenue			**$400.00**

Some of the materials and resources from the Facilitator's Exchange SIG sessions are in the data repository, Hinztime. We have four people who have expressed interest in hosting sessions in 2018 and there is room for more in the calendar. We look forward to 2018 and invite you to join us.

The coordinators for the 2017 Facilitator's Exchange plan to continue this exciting Special Interest Group in 2018.

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Community Engagement Report

Submitted by Sue Fody, VP Community Engagement

This year, Sue expanded her the role of Community Engagement to include 1) Executive Advisory Council (EAC), 2) Consultant Directory, and 3) Student Members. The 2016 VP Community Engagement role only focused on the EAC. However, a broader approach was recommended by the president to include outreach to consultants and students. Sue transitioned to this role in May as the former VP resigned. Previous to this transition, Sue had the role of VP Volunteer Engagement. We restructured this role to be a Director level role reporting to VP Community Engagement. Therefore, Sue provided the information below based on her oversight of the Director of Volunteers.

Volunteers
Director of Volunteer Engagement, Jeannie Clinkenbeard

Number of volunteers

2017 list of volunteers - receiving monthly requests for volunteer support	100	No longer implemented on a monthly basis as of September 2017
Unique individuals who covered meeting responsibilities	12	
Volunteered for special projects/support positions	6	Jeannie, Dena, Sabrina, Barb, Danielle, Jill
Recruited from the outside for board positions	1	Ivelise Zambrano-Herrera
Transitioned from volunteers to the board or director role	1	Jeannie Clinkenbeard

Summary Report for the Volunteer Committee
In mid-2017, the board restructured to create the position of Director of Volunteers, who reports to the VP of Community Engagement. Jeannie Clinkenbeard, an engaged volunteer agreed to fill this new role. This role is not a voting member of the board.

In 2017, the volunteer strategy for the chapter changed. The focus shifted to requesting volunteers for positions or tasks, and no longer includes meeting registration volunteers. We changed the registration process whereas we no longer offer discounts to volunteers and ask them to register attendees at the event. The Director herself checks in attendees using a Wild Apricot app, entering the data directly into the database. This streamlined process greatly reduced the amount of administrative work for monthly events.

We held quarterly New and Potential Member meet-and-greets. From the first new member event of 2017, we recruited Ivelise, the upcoming 2018 VP of Programming. In addition to the President and/or President Elect, the VP Membership attending these events, the Director of Volunteers attended to generate enthusiasm about joining the chapter in a volunteer role. Jeannie has come up with some creative strategies to recruit volunteers, including developing a video clip announcing open positions to be published on the chapter's website in 2018.

Other volunteers recruited for support positions or special projects were:
- Dena Rezai serves as the new Student Membership Liaison along with the support of VP of Community Engagement
- Sabrina Bernsten serves as a virtual volunteer for the VP of Technology
- Barb Smith serves as an assistant to the Communications team
- Danielle Watkins and Maryann Mattison supported the Programming committee
- Jill Schnipke served for marketing support for work on the chapter banner with Alphagraphics, and total set up and management of the Meet Up group
- Meeting volunteers served each month to support the check-in process until September, at which time we streamlined our check-in procedures. At the end of each meetings, each volunteer was recognized by name and thanked for their time and expertise. Additionally, each received a small token of appreciation (usually an ATD notepad) for their efforts. They also enjoyed attending the meeting at a discounted rate.

Executive Advisory Council
The concept of an Executive Advisory Council (EAC) was presented to the 2016 Board by Nate Singsen, former VP Community Engagement. This initiative was a good return on investment for the chapter as a result of Nate attending the 2016 All Leaders Conference (ALC).

The EAC launch schedule was presented and approved by the Board in early 2017. The implementation included a call for nominations by local talent development leaders within the Denver metro area. Each of the 11 self-nominations was reviewed and approved by the Board during first quarter of 2017. In May, we held a welcome dinner for all EAC members and the Board to get to know one another. The first official EAC meeting was held in June and attended by all EAC and Board members. The objective of this first official meeting was for the board to provide an overview of each Board role and function so that the EAC members could get to know the chapter's goals and current operations. The EAC were enthusiastic and generated ideas for the Board to consider moving forward. Two subsequent meetings were held for third and fourth quarters.

There was a transition of leadership after the first EAC meeting due to the resignation of Nate Singsen. Sue transitioned to serve as a liaison between the Board and EAC. During the second meeting in September we all agreed to the mission of the council, then asked council members to introduce themselves on a deeper level and include their expertise, talents and DiSC profiles. The most significant action was to brainstorm project topics for council members to eventually work on collaboratively in 2018. The brainstorm list was "bucketized" by the ATD board, and has become committee topics. The last meeting of the year was in December, when committees were formed, topics chosen and actual EAC word began!

Consultant Directory
The Consultant Directory is an initiative to add value for our membership who are small business consultants with five or fewer employees. As a member benefit, the Consultant Directory is a free value-added benefit of membership. The goal is to have a searchable consultant list, initially searchable to the membership only, to find and use talent and help promote our small business members. The directory is currently in a forming stage. The

December newsletter included the announcement and encouraged qualified businesses to update their member profiles in order to participate. The consultant directory will pull relevant information from member profiles and populate the Consultant Directory template in a usable and searchable form. The VP of Technology Ginger Nichols, was instrumental in creating this profile using our Wild Apricot database and website.

Student Members
A greater focus on generating student members is a renewed initiative for the chapter. Dena Rezai, a current student and student member, agreed to serve as the Liaison for Student Memberships. To attract students, beginning in 2018, student memberships will have an "all-inclusive" membership rate of $87, which is discounted at 30%, and will offer benefits of learning experiences (chapter events), professional and mentor relationships. Dena and Sue Fody were invited to do a presentation for an undergraduate communications class at Metro State University in October. This presentation introduced students to our organization and resources. As an outcome of that presentation, we have one more new student member. We look forward to an expansion of this program in 2018 with the support of the Student Liaison role.

Sponsorships Report

Submitted by Shawn Evans, VP Sponsorships

In 2016 a strategic decision was made by Yvonne Bogard, President Elect, and Robin Doss, President, to restructure the VP Sponsorship role from VP Community Engagement role enabling increased focus on Sponsorships for 2017. Shawn Evans assumed the VP Sponsorship role for 2017, which had been vacant for several years.

Major Accomplishments
- Grew sponsorship cash revenue from $325 in FY2016 to $1,650 in FY2017. Sponsors included Panopto (Gold Sponsor), Powers Resource Center (Gold Sponsor) and Collaborative Action (Advertising).
- In-kind services and venue sponsorship was estimated to be over $2500 from Tier1 Performance, Powers Resource Center, Four Winds, West Metro Fire Protection District, and Daniel's Fund.
- Analyzed other chapters Sponsorship programs to help inform the RMC strategy.
- Major revision and updates to the sponsorship levels with the development of three tiers (Gold, Silver and Bronze) and corresponding sponsorship benefit packages.
- Content updates to sponsorship brochure and web page.
- For the first time in recent history of the chapter, we sponsored the DisruptHR 2017 Denver on March 16.

  "DISRUPT is an information exchange designed to energize, inform and empower people in the HR field. DisruptHR is built on the belief that how we've approached people and talent in the past won't be the best way to approach it in the future."
  Source https://disrupthr.co/denver/.

  This event was an important networking opportunity for the chapter to build awareness of the ATD brand locally, discuss similarities with HR talent development and the ATD Competency Model, and build our local chapter outreach with increased chapter visibility to an audience of approximately 350 HR professionals.
  - As a sponsor we had a booth decked-out with chapter materials and lights to draw attention.
  - Gave away a sponsorship gift bag with a free chapter membership, ATD branded marketing materials (coffee mug), and chapter branded promotional items.
  - Gave out coupons to attend one chapter event for free during 2017 – with a good return on our investment of 16 new attendees.

Shawn Evans is transitioning to VP Membership for 2018 since Eric Savickas, 2017 VP Membership has resigned at the end of 2017 in order to dedicate more time to building his consulting business. Jean Eckhoff, 2018 Chapter President, is recruiting for a new VP Sponsorships for 2018. The new VP of Sponsorships will focus on continuing the strategy for growing local sponsorships in 2018.

January 18, 2018

Technology Report

Submitted by Ginger Nichols, Vice President of Technology

This year presented a great deal of change and project implementation for the Technology team led by Ginger.

Chapter Website Updates
One of the major projects successfully implemented this year was the update of the chapter's website (www.atdrmc.org) for a more modern and mobile friendly format. Our goal was to provide more flexibility for our members such that they can visit the chapter website on any device and platform. We have streamlined the information to be more concise and easy to read, while ensuring each webpage meets the chapter's branding standards, which are based on national's requirements and recommendations.

Consultant Directory
A joint collaborative effort with VPs of Community Engagement and Membership, and the Technology team, a solid design and development of Consultant Directory was implemented in fourth quarter. The Consultant Directory has been set up to be free of charge for all members to participate and benefit from those who own small businesses of five or less employees. The goal was to provide another way to add value for our membership by facilitating a way to connect member's needs with small businesses for services.

Transition to G-Suite for Nonprofits
In order to support our Board's leadership needs, we needed a solution with more flexibility and ease of maintenance with succession transitions. The Board currently had 13 members, a Director, a Student Liaison, and a Chapter Administrator. Our previous chapter related email accounts were hosted with our Domain Name Service (DNS), GoDaddy. We needed to expand and streamline our administrative overhead for email account. With the support and suggestion of Ann Baus, our new Chapter Administrator, we looked into G-Suite for Nonprofits. After a short application and verification process, our chapter was granted approval from Google for the entire G-Suite of products. We migrated our email service from GoDaddy to Google. This will save the chapter approximately $163 annually.

Now we can have up to 1,000 email addresses at our domain @atdrmc.org. We've implemented the use of @atdrmc.org for all chapter communications. This provides a professional presence to our membership as well as a history of emails by Board role for Board transitions and succession support.

The use of G-Suite has also been a valuable tool for project management and serves as a data repository for document archival, history, and reference. We are working to learn even more ways to leverage G-Suite moving forward.

Technology Service Discounts
With the help and support of Ann Baus, our new chapter administrator, we have learned that since the chapter is a nonprofit organization, many of our vendors offer nonprofit discounts. For

example, by providing our EIN, we were able to cut our monthly expenditure on Hootsuite from $14.99 to $7.50 per month. This is a great tremendous benefit since it allows the chapter to continue to communicate with membership using high-quality technology based tools while freeing up chapter funds that can be invested in chapter members and programming. We look forward to work with the VP of Finance to review all of our technology services for further discounts in 2018.

Wild Apricot Database Clean Up
Ginger attended a session at the All Leaders Conference (ALC) and as a result, the she undertook the much needed project to clean up our Wild Apricot database of members and contacts. This was important for two reasons. First, we were quickly approaching our limit of 2,000 contacts for our pricing level. Second, Houston Chapter speakers at ALC stressed the importance of protecting member's data by filtering out those with malicious intent. All members and contacts who have not made contact with the chapter since 2015 have been archived.

Daily Maintenance
Throughout the year, the Ginger worked to keep the website up to date with relevant information for members including posting events and editing content. As the webmaster, Ginger also helped the Board and chapter members with technical problems with the site. Further, she monitors and reports to the Board site usage through Google Analytics. She was instrumental in updating the Google Analytics account gmail account to the webmaster@atdrmc.org account. This change supports future succession transitions.

Communications & Social Media Report

Submitted by Stephanie Lang, VP of Communications & Social Media

2017 Highlights
- The initiation and implementation of the new Talent Musings blog at https://www.atdrmc.org/Talent-Musings. This blog provides a communication medium for our members to share what's on their mind in the talent development industry.
- The creation of a marketing online form that supports a streamlined and collaborative approach for the essential communications amongst the VPs of Programming, Technology, and Communications. This allows for uniform and consistent critical programming event information sharing for all communications and marketing needs. Refer to the Event Marketing Form at https://goo.gl/forms/lPbs0cxLdA13Guw02.
- The creation of a new job posting form to streamline the communications process for those in the Denver metro area who are looking for a way to publish their job opportunities with our member. The job posting form is available to anyone who wishes to post an open position on our chapter's job board. See the Job Posting Form at https://goo.gl/forms/rLf5AaafAmNitO192.

Electronic Communications
In terms of e-communications, our chapter's communications were consistent throughout the year with a monthly newsletter that focused on the President's Message, special announcements, opportunities for learning, articles from our sponsors and information about ATD Power Membership. In addition to monthly newsletters, monthly event emails were sent to highlight upcoming monthly chapter events.

During 2017, we had an average of 1030 active contacts. Our overall email open rate was 24.25%, of which, 27% of emails were opened on mobile devices and 73% of emails were opened on desktop computers. Our click through rate was 15.03%.

Social Media Communications
In terms of Social Media platforms, Facebook, LinkedIn and Twitter, are utilized to expand our communication efforts about upcoming events to the Denver metro area and beyond.

Social Media Links
Facebook:	https://www.facebook.com/atdrmc/
Twitter:	https://twitter.com/atdrmc
LinkedIn:	https://www.linkedin.com/company/16208616/

According to our Hootsuite Analytics the chapter's Facebook page activity increased by 22 *fans* to a total 169 *fans*. The chapter's engagement score for the year was 391, which accounted for 136 *reactions*, 23 *comment* and 232 *shares*. Our Twitter account had a total of 680 *followers* and the engagement score for the year was 29, which accounted for 2 *quotes*, 11 *retweets*, and 16 *likes*.

In terms of social media strategy, Thomas Toth, a social media expert and member of our

Executive Advisory Council, consulted with us on our social media strategy. Based on his recommendations, each month we selected a Talent Development topic, which we posted content on that topic on our social media channels. Examples of months' topics include: onboarding, data analytics in Learning and Development, and the effect of the intelligence revolution on Talent Development.

We are sad to see Stephanie go but understand the demands of work-life balance. We wish her the very best in 2018 and beyond. Stephanie hopes to rejoin the board in the future. As part of Stephanie's succession plan, see recruited Lisa Gilliard, a volunteer who had been helping her with communities this year. She has trained and onboarded Lisa to be ready to step into her new responsibilities for 2018.

Recommendations for 2018
1. Close/remove the chapter's LinkedIn "group" page with *652 members.* Additionally, we have a "LinkedIn "company" page with *68 followers*. The purpose of the "group" page has been to allow for member discussion. However, the purpose of the "company" page is to allow us to communicate our official news and updates. The "group" page is under-utilized by our membership. Stephanie recommends that the chapter pursues a campaign to convert members from the "group" page to the "company" page. After the transition, she suggests that we close/remove the "group" page and only utilize the "company" page. See LinkedIn Group page at https://www.linkedin.com/groups/99819 and, LinkedIn Company page at https://www.linkedin.com/company/16208616/
2. Actively pursue and engage more usage of the new Talent Musings blog. Posting original content on this blog will help position the chapter to be recognized as a go-to resource for talent development organizations in the Denver metro area.

End of 2017 ATD Rocky Mountain Chapter CARE Annual Report