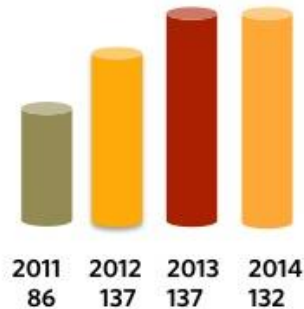


2014 Annual Report

ATD Kansas City Chapter Mission:
 To promote excellence in the field of learning and development

MEMBERSHIP NUMBERS



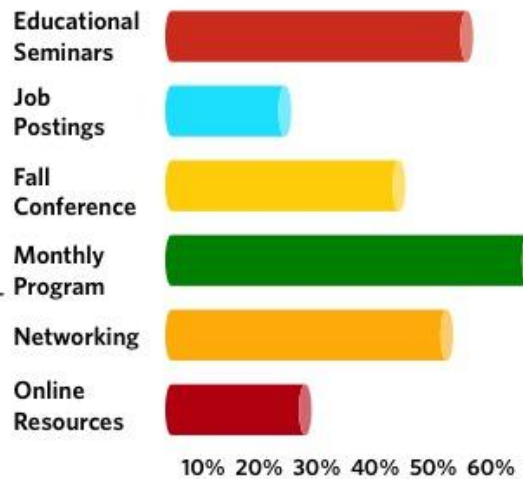
PROFIT
BUDGET vs. ACTUAL

\$2,550

VS.

\$8,728

SURVEY RESULTS MOST VALUABLE SERVICES

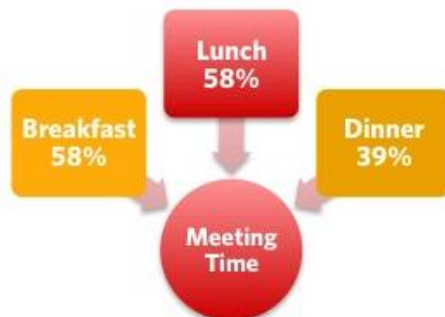


POWER MEMBERS



45%
 of ATD-KC
 Members
 are ATD
 National
 Members

Preferred Meeting Time



87.5%

would Recommend ATD-KC to
 other Talent Development
 Professionals

Letter from the Current President

2014 has most certainly been a year of transition for the Kansas City Chapter of ASTD – now, ATD. We added several new board members, switched our website to a new platform, formed a Chapter Recognition Committee to analyze the Best Practice Award Ceremony and make recommendations for 2015, and worked at increasing efficiencies. Each of these changes had an impact on our chapter and we could not have made it through the year without your support, encouragement and recommendations. 2014 turned out to be an amazing year, and we are so appreciative of your time and commitment to ATD. Grateful.

Being the President this past year has provided me with tremendous opportunities to get to know many of you, and I am so appreciative of your support. You attended meetings and invited guests to accompany you. I cannot tell you how many times I heard, “Have you attended an ATD meeting this year? If not, you need to attend...they have incredible presenters.” As a board member, it is rewarding to hear that people are receiving benefits from their membership, in addition to networking with other professionals in the learning and development industry. Collaborative.

Lastly, I would be remiss if I did not thank the board members for their countless hours of preparation, patience and most importantly, passion. This board worked with the Fall Conference Planning Committee to achieve a successful Fall Conference, increase attendance in our monthly meetings, build professional relationships with our current and new sponsors, and most importantly, believe in the mission of our chapter. Unity.

I am pleased to turn over the leadership reins to Sally Kopyy. She is an inspiration and has the motivation and drive to take this chapter to the next level in 2015.

I look forward to seeing you all in 2015 at monthly meetings and appreciate the honor of being your President in 2014.

With great appreciation,

B. Jill Joiner

2014 President

ATD Kansas City Chapter

Greetings from the 2015 President

It is an honor to serve as the President of the ATD Kansas City Chapter. I am delighted to serve on the chapter's Board of Directors with other enthusiastic and dedicated talent development professionals. While the chapter continues to be a fiscally sound organization with high membership satisfaction, there are areas in which the Kansas City Chapter can improve and enhance our services.

My goal for the next year is to add additional resources to our current service offerings to enrich your membership experience. There will be new opportunities for chapter leadership involvement. With our new award program, you will have a chance to recognize excellence and learn from best practices in talent development. I am committed to working with our chapter leadership to deliver resources that will allow you to grow professionally and network with other learning and development professionals within the community.

The Board of Directors recently met to plan for 2015 initiatives and reviewed your Annual Survey feedback. The Board is already hard at work to develop new committees and initiatives in 2015.

We look forward to having a productive and collaborative year and it is our hope that you will join with other professionals at programs and events. We hope you will find a place to serve others and grow together.

We need each other,

Sally Koppy

2015 President

ATD Kansas City Chapter

Financials

	<u>Dec 31, 14</u>		<u>Jan-Dec 2014</u>
ASSETS		Income	
Current Assets		ASTD Chapter Incentive Program	405.15
Checking/Savings		Educational Programs	
Bank of Blue Valley	22,008.48	Awards Programs	60.00
Bank of the West	<u>7,276.77</u>	General Membership Meetings	3,417.74
Total Checking/Savings	<u>29,285.25</u>	Seminars	<u>17,202.25</u>
Other Current Assets		Total Educational Programs	<u>20,679.99</u>
DWS Investment Account	3,668.51	Interest	3.34
Petty Cash	<u>100.00</u>	Membership	
Total Other Current Assets	<u>3,768.51</u>	New	2,625.00
Total Current Assets	<u>33,053.76</u>	Renewal	<u>3,600.00</u>
Fixed Assets		Total Membership	<u>6,225.00</u>
Computer Equipment	2,046.95	Sponsorships/Advertising	
Accumulated Depreciation	<u>(2,046.95)</u>	Sponsorships	1,450.00
Total Fixed Assets	<u>-</u>	Job Bank	<u>450.00</u>
TOTAL ASSETS	<u>33,053.76</u>	Total Sponsorships/Advertising	<u>1,900.00</u>
		Total Income	<u>29,213.48</u>
LIABILITIES & EQUITY		Expense	
Equity		Educational Programs Expense	
Retained Earnings	25,625.47	Annual Conference	3,441.16
Net Income	<u>7,428.29</u>	Annual Leadership Conference	1,663.53
Total Equity	<u>33,053.76</u>	Awards Program Expense	605.96
TOTAL LIABILITIES & EQUITY	<u>33,053.76</u>	General Membership Meeting	<u>2,497.74</u>
		Total Educational Programs	<u>8,208.39</u>
		Expense	
		Operating	
		Advertising	543.23
		Bank Service Charges	1,759.27
		Conventions & Meetings	
		Board Meeting Expense	<u>70.00</u>
		Total Conventions & Meetings	<u>70.00</u>
		Insurance	
		D&O	<u>1,051.00</u>
		Total Insurance	<u>1,051.00</u>
		Miscellaneous	746.90
		Postage and Mail Expense	92.00
		Professional Services	
		Management Fee	<u>9,075.00</u>
		Total Professional Services	<u>9,075.00</u>
		Web Site Expsne	<u>239.40</u>
		Total Operating	<u>13,576.80</u>
		Total Expense	<u>21,785.19</u>
		Net Income	<u>7,428.29</u>

2014 Goals & Progress

President

Board Member Onboarding

- Onboard new Board Members
 - Board members attended an onboarding retreat on Friday, December 6.
- Identify Risk Assessments
 - Board members successfully identified risks
- Form a committee to evaluate the chapter's Best Practice Awards Ceremony and make recommendations to the Board of Directors.
 - A Chapter Recognition Committee analyzed the current Best Practice Awards program and made recommendations to the Board of Directors for a new brand award program to recognize Kansas City market talent development projects. The new Excellence in Practice Awards Ceremony will be held on March 3, 2015.

President-Elect

Succession Planning for Future Board Members

- Nominate board members for 2015.
- 3 new board members were nominated to serve on the Board of Directors.

VP of Membership

ATD PowerMember Program

- Effectively market the PowerMember program
 - The PowerMember program was placed on the ATD Kansas City website, chapter meeting PowerPoint loop, and materials were made available.

Annual Survey

- Conduct a membership survey to ensure programs are aligned with member needs.
 - A survey was sent to all members and reviewed by the Board of Directors at the December Board retreat.

Fall Conference Marketing

- Effectively market the Fall Conference and increase the number of participants.
 - A Fall Conference committee met bi-monthly for 8 months and oversaw the marketing and planning of the conference. 107 members attended the conference.

2015 Goals

President

Board Member Onboarding

- Onboard new members.
- Assess chapter risks at the February 2015 board meeting.

President-Elect

Board Member Descriptions

- Update and retain clear, concise descriptions for Board Member Roles.

CPLP Study Group

- Organize CPLP study group

Committee Recruitment and Organization

- Encourage Board Members to seek out Directors to assist with programs and tasks.
- Provide survey forms for members to fill out at meetings if they would like to volunteer.

VP of Communications and Marketing

Communications

- Ensure that information shared with our members is accurate, consistent, meaningful, and of value.
- Ensure that communications are in compliance with ATD guidelines.

Marketing

- Work with EiP Committee and Fall Conference Committee to effectively market these events.

VP of Programs and Events

EiP Awards

- Work with Excellence in Practice committee to hold a successful event in March of 2015.

Fall Conference

- Form a fall conference committee and hold an event focused on training facilitation in late October of 2015.

VP of Membership

Member Recruitment

- Tap into the resources of current members
- Invite members to attend CPLP study groups
- Personal touch
 - Ask each member to reach a new member. Ask each member to bring a first time guest to monthly chapter meetings.
 - Provide chapter information on how to present benefits of membership to co-workers, colleagues, etc.
- Social Media/Online Networking
 - Share benefits online to prospective new members; invite them to a monthly meeting.
 - Invite guests from other local professional association groups.
 - Post to various online boards (LinkedIn, etc.)
- Communications
 - Communicate to past members through Email or written communication.
 - Invite affinity groups to meetings and networking events.

Member Retention

- Utilize the genius within
 - Seek out current members to lead or join committees, volunteer, and share resources.
 - Inquire about members industry specific knowledge and sharing a best practice: Member Moment (at monthly meetings)
- Use self-selection to find those interested in volunteering for:
 - Planning committees
 - Meeting prep
 - Hosting meetings
 - Potential speakers within the membership
 - Brainstorming sessions
- Personal communications and networking
 - Member spotlight
 - Community Volunteerism, participate as a group in a local community outreach.

Membership

- Market PowerMembership on our website, in a monthly email blast, and at each chapter meeting.
- Send an annual survey to all members in November of 2015.

Ambassador Program

- Recruit a Director of Ambassador Program and work to develop program in 2015.

VP of Finance

Dashboard

- Create a dashboard for board financial reporting.

2014 Volunteers

All of these accomplishments would not be possible without the tireless work of the many volunteers who have supported the chapter this year. These include our Fall Conference committee and presenters, chapter meeting presenters, website warriors, and more. We would like to give special thanks and recognition to the following individuals.

Jane Alstatt	Joan Lightsey
Jennie Ayers	Erin Matyak
Jessica Boos	Ashley Meredith
Debra Calvert	Andrea Munson
Ken Cooper	Peter Neilsen
Mark Eaton	Paula Potter
Mike Edwards	Mickie Schroeder
Judy Favor	Doug Seaberg
Tracie Glasscock	Consuela Shorter
Laura Harris	Stephen Smith
Robert Henry	Andria Stokes
Jane Galvin Hermstedt	Larry Straining
Stephanie Hong	Joel Switzer
Robert Isaacson Ph.D.	A'Yanna Webster
Jeffrey Jans	Mark Wilson
Jewell Lavender	

2014 Board Members

2014 EXECUTIVE COMMITTEE

President	Jill Joiner
Past-President.....	Meghan Freeman
President-Elect.....	Sally Koppy
VP of Communications & Marketing.....	Heidi Matthews
VP of Finance	Bob Barickman
VP of Membership.....	Christy Rogers
VP of Programs & Events	Barbara Weathers

2015 Board Members

2015 EXECUTIVE COMMITTEE

President	Sally Koppy
Past-President	Jill Joiner
President-Elect	Christy Rogers
VP of Communications & Marketing.....	Ashley Meredith
VP of Finance	Bob Barickman
VP of Membership.....	Joan Lightsey
VP of Programs & Events	Kate Guenther