

**ATD BOOST! 2016 Oklahoma State Conference**

**Summary Committee Report**

**Introduction**

This report is submitted to the ATD Central Oklahoma Chapter conference committee and board to summarize the final outcomes of the **ATD BOOST! 2016 Oklahoma State Conference** as well as the preparation process and decisions. It is meant to act as a knowledge transfer document to assist future conference committees.

**Overview**

The ATD chapters of Oklahoma (Central Oklahoma and Tulsa) alternate from year to year hosting a State Conference for the members of ATD in Oklahoma. This helps the conference be more accessible to members in different areas of the state. Over many years past, the two chapters have tried different arrangements for organizing the conference; joint committees, hosting separately and splitting profits and losses, hosting completely separately, and the current model of hosting separately but supporting and promoting the conference on behalf of each other. The two chapters currently have a very supportive relationship. Currently, the hosting chapter is responsible for all organization, profits and losses, while the non-hosting chapter promotes the conference heavily to its members and donates $1000 towards the event. Typically, the conference is held in October and the chapters do not hold a regular monthly meeting during October in order to support the conference.

In 2012 the decision was made to start branding the OKC conference as BOOST!, The Tulsa Chapter has continued the decision for continuity. The official way to list the name of the conference is “ATD BOOST! YEAR Oklahoma State Conference.” This puts ATD first and BOOST in all caps with the exclamation point. Then the year of the conference, then the state identifier of Oklahoma. Then the fact it is a statewide conference. The official social media hashtag is #ATDBOOST. This allows the conference to be found from year to year.

Although these decisions have been compiled over the last several years for continuity sake, they have only been seen as best practices by current and previous committees and future committees are not held to these decisions. They should do whatever is in the best interest of Oklahoma ATD members and the success of the conferences.

**Planning for 2016 Conference**

Planning for the 2016 conference began immediately following the 2015 conference in Tulsa. As always, committee members evaluate the conference from year to year and begin thinking about how to make the next conference a great one for our members. We learn from putting on our conferences, watching the conference from the other chapter, and from things we learn attending conferences in other associations and organizations.

The key components to organize are:

* date
* venue
* catering
* conference format
* presenters
* sponsors
* pricing and registration model
* project timeline

We started by articulating what our goals would be for the conference this year. We decided our goals would be:

1. Provide a meaningful experience to members of Oklahoma ATD through education, networking and encouragement.
2. Attract potential new ATD members.
3. Have first class presenters that meet the needs of our members.
4. Be financially neutral.
5. Have great relationships with our sponsors, presenters, vendors and between chapters.

These goals turned out to be very important and guided many decisions and interactions throughout the next year.

We knew we needed to brainstorm conference formats, put out a Call for Presenters and find a keynote speaker but all of those things were contingent on when we would be having the conference. When was contingent on where. We had used Moore Norman Technology Center (MNTC) in the past and really liked that venue. We talked to them as well as a few other venues. Many years ago this was a two-day conference. Somewhere around 2012 we began making it a one-day conference on Thursdays. Since it is in October we have to be careful to not schedule it close to the OU-Texas game or on Fall Break. Because we were planning early, many schools and universities had not set their fall break schedule for 2016 yet. We waited until they did. Then we got back with MNTC and taking all of those factors into account, the Thursday we needed was already booked but Friday was open. After discussion we decided to move the conference to Friday. In the end, this turned out to be a great decision that participants loved. However, because of snow days used throughout the year, by the time the conference got here, many schools and universities had moved their Fall Break and it was now during the conference. We do know there were some who said they could not attend because of that but do not think it was a major problem.

We talked about different possible formats for the conference. It is very common to have a keynote speaker in the morning and breakout sessions for the rest of the day. We had also done two keynotes in the past with one being a closing keynote to help keep people from leaving early. With the conference being on a Friday afternoon we felt like we needed something very strong to keep people from leaving early and skipping out on the last breakout sessions. After toying with many ideas we landed on an Executive Panel with people who ultimately oversee the talent function in their organization but have a big picture view. It would give our members an opportunity to have a Q&A with people they may not get to talk to on a regular basis. We were not sure if this would work but in the end we had very few people leave early and very favorable responses about the panel.

We brainstormed theme ideas and selected “Exploring New Frontiers.” We wanted the conference to be about where the talent industry is headed and preparing our ATD members to think about the future. As soon as we had our date, venue and theme we sent out a public Save the Date announcement for the conference. This was in January.

With all of this in mind we were ready to find an appropriate keynote speaker and send out a Call for Presenters. In March we sent the CFP, it was due in late April. We announced our list of presenters on May 6th. (Author’s note: This was all about six weeks behind schedule. In February, I ruptured a disc in my neck. I did not realize that was what had happened at the time. I was going through treatment and tests. My lack of availability for leadership on the project timeline was slowing us down. This continued to be an issue throughout the rest of the year as I ended up having a cervical discectomy. However, we made it through thanks to a great team.)

During that time frame we brainstormed keynote speakers and after interviews selected Dr. Nathan Mellor, CEO of C3 Brands and Strata Leadership. As soon as he was selected we began to publicize that information. Once we selected our breakout session presenters and our executive panelists we publicized our full list of conference presenters.

**Conference Presenters and Agenda**

These are the final decisions we made for ATD BOOST! 2016 Oklahoma State Conference:

Friday, October 21, 2016

Moore Norman Technology Center, South Penn Campus

Exploring New Frontiers!

*Keynote Speaker:*Dr. Nathan Mellor CEO, Strata Leadership

*Executive Panel Discussion*

· Jason Eliot, Chief Experience & Talent Officer, Vice President of Human Resources, INTEGRIS

· Jay Hawkins, Vice President of Human Resources, Chesapeake Energy

· Richard McPherson, Executive Director, Oklahoma Employment Security Commission

· Jeanette Rice, Executive Vice President, Assistant Chief Operating Officer, American Fidelity

*Breakout Workshop Sessions*

· Boosting Your Impact: Getting a Seat at the “Decision-Making” Table;: *Erin Grielick PhD*

· Bust or Boom? Is Attraction Fueling Your Talent Management Strategy?: *Elaine Orler*

· Creating Successful Workplace Learning Environments: *Bucky Dodd PhD, Rob Reynolds PhD, Milissa Copeland*

· Exploring Our Ever Changing Frontier:*Kyle Killingsworth*

· Integrated Talent Management Systems-Scalable Technology or Expensive Virtual Paperweights?: *Keith Meyerson*

· Path to Success-Leadership Behaviors for Today and Tomorrow: *Heather Henshall*

· Seven Strategies for Superb Presentations: *Donna Rynda*

· The Influence of Media on Workplace Bias: *Beverly Glover*

· Using Narrative to Grab Engagement Like Never Before: *Jeff Provine*

*Agenda*

|  |  |
| --- | --- |
| 7:30-8:30 | Registration & Breakfast |
| 8:30-8:45 | Welcome |
| 8:45-10:00 | KEYNOTE |
| 10:00-10:30 | Break |
| 10:30-11:30 | Session I |
| 11:30-12:30 | Lunch |
| 12:30-1:30 | Session II |
| 1:30-1:45 | Break |
| 1:45-2:45 | Session III |
| 2:45-3:00 | Break |
| 3:00-4:00 | Executive Panel |

**Pricing Model**

Over the years we have tried various pricing models. This year we believe we have fine-tuned a very successful model that works for many different reasons. This model is reasonably priced for our members, covers our costs per participant, allows us to move as many participants as possible into early registration so we can get a decent idea of how the conference is performing, and allows a good headcount for catering.

Here is our pricing we used this year:

|  |  |
| --- | --- |
| **Early Registration (Through 9/15)** |  |
| Members/OCHRS | 149 |
| Non-Members (includes membership to COC-ATD) | 199 |
| Students/Unemployed/Volunteers | 79 |
|  |  |
| **Regular Registration (9/16 through 10/13)** |  |
| Members/OCHRS | 179 |
| Non-Members | 199 |
| Groups of 3 or more (not advertised until 9/16) | 149 |
| Students/Unemployed/Volunteers | 79 |
|  |  |
| **Late Registration (10/14 through 10/21)** |  |
| Members/OCHRS | 199 |
| Non-Members | 219 |
| Students/Unemployed/Volunteers | 99 |

We also comped presenters and sponsors to the event. They need to be registered so they can be included for counts of swag and catering.

This gave us the following results for the conference:

Early-Blue

Regular-Orange

Late-Gray

Comped-Yellow

Tracking these results from year to year will be helpful for future conference committees to estimate conference planning progress.

**Sponsorships**

This was an area in which our team did not feel very strong. We relied on past documents and conversations with the Tulsa Chapter past conference chair to guide in our decision making process. The struggle is to make the sponsorship valuable for the vendor yet not be giving away the sponsorship in relation to the price of the conference and the comped registrations that come with a sponsorship. We eventually landed on the following sponsorship levels:

Conference Sponsor: $10,000

Be the exclusive conference sponsor. Ten registrations. Available for a limited time.

Platinum Sponsor: $5000

Receive name/logo on program cover, full back cover of program, five minutes before introduction of keynote speaker, five minutes during lunch, name/logo on all breakout session signage, name/logo on all food signage, marketing on conference website, one-page handout in attendee bag. Five registrations. Available for a limited time.

Session Sponsor: $2500

Full page ad in program, vendor booth, logo on breakout session signs, marketing on conference website, one-page handout in attendee bag. Two registrations. One available.

Food Sponsor: $2500

Name/Logo on signage at all food stations (breakfast, lunch and snacks), half page ad in program, vendor booth, five-minute presentation during lunch, marketing on conference website. Two registrations. One available.

Boost Sponsor: $1500

Half page ad in program, vendor booth, marketing on conference website. Two registrations.

Oklahoma Sponsor: $750

Choice of half page ad in program or vendor booth. One registration.

Program Sponsor (ala carte):

Attendee Bag Items (Item or sponsor must be related to Talent Development industry)

* Paper Handout - $100
* Pen, highlighter, etc. - $100
* Other approved item - $100

Program Ads

* Full Page - $500
* Half Page - $250
* Listed - $100

We only had three sponsors. We did end up adding two registrations to the Oklahoma Sponsor level so those with a booth could have two people at their booth.

A recommendation for the future would be to get more counsel on how to better develop sponsorships. They are a great opportunity for vendors trying to partner with our members. Sponsorships need to be a win-win for all involved. There also needs to be a reasonable equity between the OKC and Tulsa sponsorships so sponsors can expect close to the same thing from year to year when planning for the conference. Sponsorships would be a good area for OKC and Tulsa to work together for synergy to benefit the sponsors and members as well as to enhance the conferences.

**Catering**

We have heard regular feedback that participants want good food and healthy snacks. This was a priority for us as it makes the overall conference experience a positive one. Once we selected MNTC as our location they gave us a list of approved caterers. One of those was Sodexo, their on-site caterer for the café at their school. After reviewing our options, and from working with them in the past we felt like this was a good option. We reviewed a plethora of options and considered proteins, vegetables, carbohydrates (important for diabetics) and selected the following menu:

*Breakfast:* Fitness Break-banana nut bread, individual yogurts, apple slices w/peanut butter, juices and coffee

*Lunch Buffet:* Pork Tenderloin, salad, vegetable, starch, rolls w/butter, dessert, tea and water

*Afternoon Snack:*  Protein Booster-hummus, pita, veggies, almonds

The catering was a big hit with many compliments, especially on the afternoon snack. We did have a couple comments that pork was not the brightest choice since Jews and Muslims are not allowed to eat pork. This was a complete cultural oversight on our part and something to keep in mind in future planning. We had only one actual complaint. One person complained there was not a vegetarian option. Sodexo happily went and made them a vegetarian meal. We thought this was great service from Sodexo. As it was, on the registration form there was a place to mark if you wanted a vegetarian lunch. This person apparently did not see that. The design of the lunch was such that there were plenty of vegetarian items for them to eat even if Sodexo had not taken the steps that they did. Having a way for them to request a vegetarian lunch is an important consideration.

**Swag and Conference Program**

Swag (giveaway promotional items, “Stuff We All Get”) is a mainstay at most conferences. The challenge is to give people something useful and to order the right amount. These items have to be ordered well in advance and can be very expensive. You are often estimating how any will be at your conference. If you order too much, you have wasted money and have items leftover you cannot use. Order too little and you have unhappy participants who paid for their registration but do not receive their swag. Some people love their swag while others see it as a waste. If you are going to give swag you have to charge more for the registration so it should be valuable. If you are not going to give swag you should lower your registration costs accordingly.

We made some important decisions with our swag. We decided to (a) go big in order to make the conference feel like a great conference, (b) make it useful, (c) find a great deal on the cost, (d) work hard not to get stuck with leftover stock.

To do all of this we worked hard on our estimates of participants. We also knew if we ran over the board may not get their swag. We were okay with this. We decided not to put the conference logo on the swag. We simply used the ATD logo instead. This way, if we were stuck with any overstock we could use it as giveaways at other events. We had found that swag with a past conference logo on it was not a very enticing giveaway gift three months later. As it turned out we nailed our estimate and everything worked out fine. We had great feedback on the swag and all turned out well.

The programs were put together a little late. They were okay but could have been a little higher quality. From a content standpoint they had everything we needed in them.

The nicest thing about all of this was that the swag kits came put together so nothing had to be stuffed. When participants came in they were simply handed their name tag, program and swag bag. It was very simple.

**Promotion**

The promotion for the event was done through the OKC chapter email list, the Tulsa email list, and social media. We made social media sized images for the conference as well as for each individual presenter to promote their session. Our goal was to make it easy for people to promote their session and the conference. We also asked the board to promote the conference on LinkedIn on a regular basis to their network.

It all worked in the end but it was an uphill climb and with the power of social networks I believe this conference can easily double in size. There are generally only a few people who are really doing the promoting. Some people will click “like” once in a while on the postings. I think there is a lack of understanding of the difference between liking, sharing and creating your own post and the power each of those has to your own network. If for each conference, each board member became more active and engaged about promoting the conference you could double the attendance.

This is not meant to be a criticism or condemnation in any way. It is about understanding the power of social media and knowing how to harness the power of it to maximize the conference.

**Budget**

Based on past experience we estimated a $16,000 budget for this conference. Our goal was not to make a profit off of our members but just to break even. It is very difficult to judge how all of this will come out when some large ticket items have to be ordered a month or more in advance and many people do not register until one week before the conference. You have to be very experienced at guessing.

Our final income and expenses were as follows:

|  |  |
| --- | --- |
| **Income**  |  |
|  Registration  |  15,696  |
|  Sponsors  |  3,000  |
|  |  18,696  |
|  |  |
|  **Expenses**  |  |
|  Presenter Expenses  |  2,963  |
|  Venue  |  1,335  |
|  Catering  |  4,984  |
|  SWAG  |  4,409  |
|  T-Shirts  |  269  |
|  Printing & Posters  |  1,305  |
|  Misc  |  618  |
|  |  15,883  |
|  |   |
|  Balance  |  2,813  |

**Final Summary**

For our last look at the conference we will review each of our conference goals.

1. Provide a meaningful experience to members of Oklahoma ATD through education, networking and encouragement.

Through the conference we provided opportunities for education through the keynote, breakout sessions and executive panel. We have sent electronic evaluations to participants to determine their satisfaction. Results are being tabulated. Networking opportunities were provided as people met during their sessions and lunch as well as during a long break after the keynote. Encouragement was provided from the content of the keynote as well as several of the breakout sessions. Encouragement was also given by the president at the opening and close of the conference.

1. Attract potential new ATD members.

Nine non-members attended the conference. Because of the pricing structure these participants became new members. It will now be important to meet their needs to maintain their interest in ATD.

1. Have first class presenters that meet the needs of our members.

Evaluations will tell us how well the presenters did but verbal indications were that participants enjoyed the presentations. Each of the presenters were experienced in giving presentations at conferences in the past.

1. Be financially neutral.

The conference actually made a small profit. This money will be added to the general fund. The board can decide how best to use it. It is easy for conferences to lose money so it is good to have money in reserve in case that happens.

1. Have great relationships with our sponsors, presenters, vendors and between chapters.

We were very pleased with all of our working relationships throughout the planning. We did have some minor issues with some of the MNTC staff during the day of the conference but understand they were trying to abide with their rules and we were trying to make our participants comfortable. It all worked out in the end.

In retrospect, there may be a better way to use the evaluations to determine the success of some of the relevant conference goals. It would be important to not make the evaluation too long.

We view the conference as a tremendous success and are looking forward to seeing it grow both in size and influence. The change of ATD from focusing solely on training to the larger view of talent development creates a challenge to expand the focus of the conference and the audience of our members. This has to be done without losing the base of trainers the association was built on.

The future looks bright for future conferences. Knowledge sharing between the Central Oklahoma and Tulsa chapters can be a great resource to both.