



CHAPTERS
Association for
Talent Development

ATD Cascadia

ANNUAL REPORT



2022

2022 ATD CASCADIA BOARD OF DIRECTORS



Steve Brooks

President



Caroline Olfert

Director of Professional
Development



Jared Gracie

Director of
Events



Amy Reid

Director of
Membership



D.J. Netz

Director of Board
Operations

FINANCIAL REPORT

As of November 30 2022, the chapter has incurred \$44,910.74 expenses against \$57,712.74 of revenue. Because most events were delivered virtually, operating expenses were low.

The chapter paid a \$13,995 cancellation fee to the Sheraton Airport Hotel to resolve our agreement with them from our decision to cancel a planned conference at their property.

Our Fundamentals of Training program represented the chapter's primary source of revenue, exceeding projections by 236%. Our ChIP revenue exceeded projections by 30%.

Revenue	Membership	Registrations	ChIP	
	25%	71%	4%	
Expenses	Staff	Technologies	Events	CC Fees
	36%	9%	6%	5%

ANNUAL GOALS

Pandemic conditions have had an impact on all professional associations, and our chapter served a diminishing base of members with a small leadership team. Our goals were focused on safeguarding financial reserves while providing relevant programs for our members.

The director of Marketing position remained vacant in 2022. The leadership team members developed the communications necessary to promote chapter events.

Area	Goal Description	Owner	Status
Membership	Improve onboarding process with welcome kits	D.J.	Done.
	Provide monthly virtual coffee talk sessions free for all members.	Steve	Done
	Establish community of practice group with quarterly focus activities	Steve	Done
Programming and Professional Development	Recruit new FOT instructors	Caroline	Done
	Update FOT curriculum	Caroline	Done
	Partner with Puget Sound chapter on CPTD study group	Caroline	Done
Operations and Finance	Create standard operating procedures for smooth transitions for new volunteers and board members	D.J., Ann	Done
Marketing and Communication			
Succession Planning	Continue to build a leadership pipeline for the board	Steve	Done – 3 directors appointed
	Recruit volunteers based on their interests and needs	Steve	Done

MEMBERSHIP

Our membership metrics remained stable throughout 2022. On average, we gained six new members each month, and five members renewed each month. This renewal rate can be greatly improved with outreach and diversified programming that provides value to a broader base.

Our member survey results indicate the need to provide a greater variety of program topics and more external speakers.

MEMBERSHIP BY THE NUMBERS

193

Total number of chapter members as of the last day of the reporting period.

53%

Percentage of total chapter members who are Power Members, as of the last day of the reporting period. Power Members are those who are members of both the Cascadia Chapter and ATD.

50%

The percentage of members who indicated on our annual survey that they would recommend our chapter to others.

30%

Percentage of total members who renewed their membership during the reporting period.

CHAPTER ACTIVITIES

Here are the projects and activities that the chapter completed throughout the year.

Develop, assemble, and deliver new member welcome kits
Complete documentation of Standard Operating Procedures
Partner with ATD Puget Sound Chapter on a CPTD study group

Curate Quality Learning, Networking, and Professional Development Events
11 monthly chapter meetings
4 Fundamentals of Training
1 StrengthsFinder program
Monthly free member networking events in the form of the Coffee Hour
Community of Practice