



CHAPTERS
Association for
Talent Development

ATD Cascadia

ANNUAL REPORT



2023

WWW.TDCASCADIA.ORG

2023 ATD CASCADIA BOARD OF DIRECTORS



D.J. Netz

President



Steve Brooks

Director of Finance



Amy Reid

Director of
Member Services



Kristelle Bernabe

Director of Professional
Development



Sam Schultz

Director of
Programs



Amanda McGovern

Director of Events

FINANCIAL REPORT

As of November 30 2022, the chapter has incurred \$30,679.93 expenses against \$29,390.78 of revenue. Because most events were delivered virtually, operating expenses were low.

To reduce expenses in the Technology category, the will not renew its subscription to Monday.com for 2024.

Our Fundamentals of Training program represented the chapter’s primary source of revenue. Our ChIP revenue achieved 64% of the targeted projection.

Revenue	Membership	All Events	ChIP	
	\$11,840.10	\$14,986.00	\$1,367.80	
Expenses	Staff	Technologies	Events	Credit Card Fees
	\$18,717.30	\$6,479.73	\$5,044.13	\$1,803.58

ANNUAL GOALS

The chapter's goals align with its mission and vision to empower professionals in the workplace by offering targeted networking and professional development opportunities.

Area	Goal Description	Owner	Status
Membership	Hold new member orientations to enhance member participation and to clearly articulate the value and benefits of membership to promote retention.	Director of Member Services	4 events completed in 2023.
	Each new member will receive a welcome kit that thanks them for their membership, offers easy engagement calls to action, and articulates the value and benefit of membership to promote retention.	Director of Member Services	Complete.
	Continue Outreach to Increase Renewals.	Director of Member Services	Complete
Programming and Professional Development	Engage members with relevant learning opportunities	Director of Events & Programming	Complete
	Deliver Fundamentals of Training and create one new recurring professional development program	Director of Professional Development	Complete
Operations and Finance	Stewardship of CARE qualifications & submission	Business Manager	Complete – Achieved CARE Plus
Marketing and Communication	All board members who curate events will continue to be responsible for creating the marketing messages for their assigned events.	Board	Complete
	The board will continue to increase its use of the LinkedIn platform to promote all programs and events.	Board	Complete
	The chapter will continue leveraging the Canva platform to create promotional pieces for use on social media.	Board	Complete
Succession Planning	invite interested parties to attend board meetings.	Board	Done – 4 appointments completed
	Fill open board positions: Director of Programs, Director of Events	Board	Done

MEMBERSHIP

Our membership metrics remained stable throughout 2023. On average, we gained five new members each month, and six 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 events offered at various times throughout the work week.

MEMBERSHIP BY THE NUMBERS

190

Total number of chapter members as reported at end of 2023.

56%

Percentage of total chapter members who are Power Members, reported as part of our annual CARE* submission to National. Power Members are those who are members of both the ATD Cascadia and ATD.

84%

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

40%

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 2023.

- Achieved CARE Plus compliance in February 2023.
- Delivered 38 professional development and networking events.
- Provided four new member orientation sessions.
- Launched a monthly Learning Leaders SIG, managed and delivered by two former board members.
- Partnered with Fierce Inc to deliver a learning series consisting of a Lunch & Learn and a half-day workshop in June.
- Completed a strategy to revise the Fundamentals of Training curriculum