

# **Metro DC Chapter of ATD Annual Report**

**2014**

## Letter from the Current President

Many of us have a desire to utilize our skills and abilities in a meaningful way, yet the thought of volunteering is often overlooked as something to do “one day” when there is more time. Reflecting back on 2014, I am grateful that I accepted the opportunity to lead this chapter in this moment because it provided me a new appreciation for volunteerism and an opportunity to give back to a cause that is truly important to me – learning and development.

It was an exciting year that was rich with teachable moments for me and full of significant chapter milestones - some that I could not have anticipated even if I tried. I am appreciative for all of the contributions of the 2014 Board of Directors, for without their continued engagement and passion, we would not have delivered the outstanding programming and services offered throughout the year. I learned as much from each of them as I did from the content they introduced to the chapter. While I have many to thank, I am most grateful to my personal board of champions – Kathy Reiffenstein, Foster Rockwell, Alan Sack, and Michelle Moore for their unwavering support, coaching, mentoring, guidance, and encouragement throughout this experience.

As we close out the year, I encourage you all to reflect on your 2015 goals and find a way to contribute in the next year. Whether it is only one hour or 10 hours over the year, look to find a chapter opportunity that will make you feel good about the work that you are doing and enable you to pay it forward in our local professional community.

It was an honor and privilege to serve this board in a leadership capacity. Thank you all for a great year and I look forward to seeing you in 2015.

Warmest Regards,

Andrea Evans  
Past President  
Metro DC Chapter of ATD

## Greetings from the Incoming President

Happy 2015! I am very excited about 2015, especially because I get to spend a lot of it with the members of the Metro DC Chapter of ATD. Most people focus on resolutions this time of the year. We set up goals we want to accomplish in the coming months, such as lose weight, get that promotion, etc. I like to focus on what I call “gratitudes,” i.e. people, places and things for which I am grateful. I am very thankful to be entering 2015 in the presidential role with an amazing Board of Directors. Our 2015 Board consists of hard-working and dedicated individuals who are willing to give many hours of their time to make this Chapter great. Your Metro DC Chapter Board of Directors has set some amazing goals to accomplish this year to give back to the membership, so keep checking the website and the Chapter emails for announcements as each program or initiative is launched. Most importantly, let’s have some fun!

Warmest Regards,

Christina Eanes  
President  
Metro DC Chapter of ATD

## 2014 Chapter Accomplishments

This year the Board of Directors focused on three chapter goals:

- Optimize Chapter systems and operations
- Enhance the DC ASTD brand in the metropolitan Washington, DC Area
- Increase Membership Engagement

The Board worked to ensure that the programs delivered and services offered always reflected these three initiatives. In addition to hosting over 60 total events – dinner programs, virtual webinars, COP events, Professional Development events, career services webinars, networking events, and orientations, we focused on internal optimization. While the list of 2014 accomplishments was long and the highlights below are only a sample of the many things we achieved and delivered to the membership:

- Introduced and celebrated the new ATD Brand!
- Hosted the National ICE conference by managing the logistics of 300+ volunteers and staffed a booth for local members.
- Created a new venture partnership with the NYC chapter and developed monthly programming that increased our branding within our local market and provided exposure to the NYC market.
- Held the first DC dinner program in over 3 years.
- Revised and approved the chapter bylaws to reflect current practices and enable more internal efficiency.
- Reintroduced the Career Services portfolio with several webinars and initiatives to assist job seekers.
- Launched a feature employer program for employers to promote open positions.
- Developed a new website and increased our Twitter followership by over 400%.
- Created bench strength by developing a volunteer pipeline that could quickly be assigned to open positions.
- Membership Milestones:
  - Increased membership by 1.6%
  - Total membership: 478
  - Joint Chapter/National members: 47%

# 2014 Year in Review – Finances

## Metro DC Chapter of ATD Profit and Loss

January - December 2014

	<u>TOTAL</u>
<b>Income</b>	
Total 06-0000 Membership	\$ 40,145.00
Total 07-0000 Treasurer	\$ 15.51
Total 08-0000 Marketing & Communications	\$ 5,612.26
Total 09-0000 Career Development	\$ 1,092.85
Total 11-0000 Monthly Program Revenue	\$ 23,188.62
Total 16-0000 Professional Development Rev	\$ 13,100.00
17-0000 Technology Revenue	1,700.00
<b>Total Income</b>	<b>\$ 84,854.24</b>
<b>Gross Profit</b>	<b>\$ 84,854.24</b>
<b>Expenses</b>	
Total 01-0100 Administration Exp.	\$ 14,213.52
Total 04-0100 Program - Talent Management	\$ 1,405.04
Total 05-0100 SIGS Exp	\$ 859.75
Total 06-0100 Membership Exp	\$ 1,406.08
Total 07-0100 Treasurer Exp	\$ 8,687.22
Total 08-0100 Marketing & Comm.	\$ 5,789.64
Total 11-0100 Program Exp	\$ 30,683.88
Total 16-0100 Professional Dev Exp	\$ 4,683.25
Total 18-0000 Technology	\$ 6,328.57
<b>Total Expenses</b>	<b>\$ 74,056.95</b>
<b>Net Operating Income</b>	<b>\$ 10,797.29</b>
<b>Net Income</b>	<b>\$ 10,797.29</b>

## Metro DC Chapter of ATD Balance Sheet

As of December 31, 2014

	<u>TOTAL</u>
<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Bank Accounts</b>	
1021 Checking - Wells Fargo	61,412.97
1022 Reserve Account - Wells Fargo	37,775.73
1130 Cash on Hand/PayPal	3,752.06
1185 Morgan Stanley/Smith Barney	0.00
<b>Total Bank Accounts</b>	<b>\$ 102,940.76</b>
<b>Accounts Receivable</b>	
1120 Accounts Receivable	0.00
<b>Total Accounts Receivable</b>	<b>\$ 0.00</b>
<b>Other current assets</b>	
1125 Accts Receivable	0.00
1220 Inventory - Supplies	0.00
1300 Other Receivable	0.00
1499 Undeposited Funds	0.00
1500 Prepaid Insurance	76.68
1501 Prepaid Program Expenses	0.00
1502 Prepaid - Other	730.48
<b>Total Other current assets</b>	<b>\$ 807.16</b>
<b>Total Current Assets</b>	<b>\$ 103,747.92</b>
<b>Fixed Assets</b>	
1600 Property & Equipment	577.49
1610 Accumulated Depreciation	-300.00
<b>Total Fixed Assets</b>	<b>\$ 277.49</b>
<b>Other Assets</b>	
1650 Software	1,400.00
1655 Software Amortization	-1,400.00
<b>Total Other Assets</b>	<b>\$ 0.00</b>
<b>TOTAL ASSETS</b>	<b>\$ 104,025.41</b>
<b>LIABILITIES AND EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
<b>Accounts Payable</b>	
2000 Accounts Payable	8,172.44
<b>Total Accounts Payable</b>	<b>\$ 8,172.44</b>
<b>Other Current Liabilities</b>	
2100 Accrued Expenses	0.00
2101 Deferred Revenue - Other	0.00
2106 Deferred Revenue - CRS	0.00
2110 Deferred Revenue - 2010	0.00
2112 Deferred Revenue - 2012	0.00
2113 Deferred Revenue - 2013	0.00
2114 Deferred Revenue - 2014	0.00
2115 Deferred Revenue - 2015	3,200.00
2401 Deferred Rev - Programs	0.00
<b>Total Other Current Liabilities</b>	<b>\$ 3,200.00</b>
<b>Total Current Liabilities</b>	<b>\$ 11,372.44</b>
<b>Total Liabilities</b>	<b>\$ 11,372.44</b>
<b>Equity</b>	
3000 Net Assets	81,855.68
3001 Opening Bal Equity	0.00
3002 Ret. Earn.- 3% Board Restr.	0.00
<b>Net Income</b>	<b>10,797.29</b>
<b>Total Equity</b>	<b>\$ 92,652.97</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$ 104,025.41</b>

## 2014 Board Members

Andrea Evans .....President

Chris Eanes .....President Elect

Foster Rockwell .....Past President

Stephanie Farlow .....VP of Operations and Finance

Kathy Reiffenstein .....VP of Membership

Pamela Marshall .....Director of Career Services

Stephanie Hubka .....Director of Communications

Tom Tatem .....Director of Communities of Practice

Caroline Hanover .....Director of Marketing

Sharron Dean .....Director of Membership Outreach

Bernadette Costello .....Director of Professional Development

Diane Elkins .....Director of Programs

Tracie Daniels .....Director of Talent Management

Rick Blunt .....Director of Virtual Programs

## 2014 Volunteers

<b>AnaLia Medina</b>	Professional Development
<b>Bobbie Dickerson</b>	Professional Development
<b>Camille Smith</b>	Programs
<b>Charlotte McKenzie</b>	Programs
<b>Chris Cataldo</b>	Programs
<b>Cindi Johnson</b>	Programs
<b>Claudia Escribano</b>	COP
<b>Deadra Welcome</b>	Professional Development
<b>Dee Dee Smart Lynch</b>	Programs
<b>Eve Princler</b>	Career Services
<b>Gina McDaniel</b>	COP
<b>Jonathan Southgate</b>	Finance
<b>Joyce Davis</b>	Programs
<b>Judy Rogers</b>	COP
<b>Kathy Zygula</b>	Career Services
<b>Katie Bonilla</b>	Professional Development
<b>Kevin Leahey</b>	Career Services
<b>Laurie Carrigan</b>	COP
<b>Leslie Harps</b>	Membership
<b>Michele Wendell</b>	Professional Development
<b>Milt Lawler</b>	Membership
<b>Peggy Linden</b>	COP
<b>Pete Smith</b>	COP
<b>Rachel Miller Griffith</b>	Programs
<b>Rob Robles</b>	COP
<b>Scott Burt</b>	Communications
<b>Sharron Dean</b>	Programs
<b>Sherie Petrie</b>	Career Services
<b>Tameca Brown</b>	Membership Outreach
<b>Yolanda Kee</b>	Professional Development



**Thank you!!**

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