



Annual Report 2015

Metro DC Chapter of ATD

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“In 2015, ATD national recognized our innovative efforts this year – all due to the creative endeavors of our amazing volunteers.”



Letter from the 2015 President

As the year comes to a close, I am so grateful for all the wonderful experiences the members of the DC ATD Chapter have given me. I have truly enjoyed the role of President in 2015 and look forward to supporting the incoming President, Stephanie Hubka, as she has some great ideas for our Chapter’s continuing evolution in serving its members.

I want to take a moment to thank all of the volunteers who provided their valuable time to help make our Chapter as great. In particular, I want to thank the 2015 board members for working tirelessly – as I reminded everyone time and time again (out of pure awe) – we are literally running a non-profit corporation in our spare time.

With the continued support of the membership, as well as those that step forward to volunteer their time for this great organization, this Chapter will continue to evolve to the premier resource for talent development in the DC area.

Thank you for a wonderful year Metro DC Chapter!



Christina Eanes
President, 2015

Greetings from the 2016 President

Happy 2016! I am thrilled - and very honored - to be the president of the Metro DC Chapter of ATD this year.

At our 2016 strategic planning session in November, we began our day with each board member sharing why they joined our chapter - and why they remain members. Two clear themes emerged: each of us wanted to make real connections with like-minded professionals, and each of us considers joining the chapter one of the best things we have done for our careers and ourselves. My hope for each of our members is that chapter involvement elicits the same passion that it does for our board. Whether connecting with us at networking events, attending some of our many virtual and face-to-face programs, joining a Community of Practice, or volunteering for our portfolios, I hope the chapter provides every TD professional in the metro DC area with powerful experiences and opportunities that advance knowledge and careers - while having a lot of fun along the way!

My focus is making 2016 the Year of You - our members. Our board is fully committed to making our members' experience with our chapter the best it can be, and we are already hard at work to provide you with new and innovative opportunities to learn with us. I am very fortunate to work with some incredibly talented and very passionate leaders on our 2016 Board of Directors. We hope you will love the variety of initiatives we have in store!

Our board will be targeting several critical goals in 2016: measurement and evaluation of our impact as a chapter, understanding the value add that we provide, and executing the learning and development strategy that we developed and approved in 2015. This work will advance our mission and vision while creating a terrific member experience, and we're excited to get to work!



Thank you for your continued support of our chapter. I'm looking forward to an exciting and meaningful year working with you!

Stephanie Hubka

President, 2016

2015 Chapter Goals & Accomplishments

2015 Chapter Goals

- Create a Learning and Development Strategy
- Update the Member Engagement Strategy
- Update Chapter Mission/Vision/Principles

2015 Accomplishments

The Board worked tirelessly this year to ensure that we continued to deliver the quality programs all while working on creating and implementing innovative projects for the continued evolution of our Chapter. Here is a sample of some of the many accomplishments:

- Created a Learning and Development Strategy based on a Community of Practice model to be implemented in 2016
- Updated the Chapter's Mission, Vision, and Principles
- Reorganized the Board to better meet the changing needs of the Chapter to include the creation of Vice President of Learning and Director of Operations and Technology roles
- Created a new Career Development Community of Practice
- Invigorated our partnership and sponsorship programs
- Created a new advisory board, consisting of DC area experts in the TD field
- Created a New Member Orientation video, now located in the Membership area of the dcatd.org website
- Held two networking events to give back to the membership, including a Potomac River Cruise
- Reintroduced a CPLP scholarship
- Increased our overall membership numbers, in addition to our national/local membership ratios
- Launched an updated mentoring program
- Held CPLP study groups, professional development workshops, webinars, dinner programs, and CoP monthly meetings
- Supported the annual ATD Leaders' Conference with over 25 volunteers
- Named Chapter of the Month for December 2015 by ATD national

2015 Board Members

| | |
|---------------------|--------------------------------------|
| Christina Eanes | President |
| Stephanie Hubka | President Elect |
| Andrea Evans | Past President |
| Stephanie Farlow | VP of Finance |
| Tracie Daniels | VP of Membership |
| Rhonda Roberts | Director of Communications |
| Doug Moudy | Director of Communities of Practice |
| Caroline Hanover | Director of Marketing |
| Bernadette Costello | Director of Professional Development |
| Rick Blunt | Director of Programs |
| Andora Calhoun | Director of Talent Management |
| Charlotte McKenzie | Director of Virtual Programs |

2015 Volunteers – Thank You!

Programs

Christina Cataldo, Lisa Cohen, Joyce Davis, Karen Drake, Rachel Miller Griffith, Cindi Johnson, Yolanda Kee, Dee Smart Lynch, Denise Riebman, Carlene Reid, and Camille Smith

Professional Development

Christina Holloway, DeeDee Lynch, Andrea Raggambi, Deadra Welcome, Karen Mack, and Cheryl Swans

Communities of Practice

Laure Beth Carrigan, Claudia Escribano, Pam Marshall, and Pete Smith

Talent Management

Elizabeth Jackson and Adaora Otiji

Communications

Mary Lynn Billitteri, Scott Burt, and Gina McDaniel

Marketing

Lisa O'Quinn, Jen Page, and Rhonda Von Diest

Virtual Programs

Mary Coleman and Jennifer Tyrell

Membership

Patricia Hayden and Tamasa Nelson

Finance/Operations

Johnathan Southgate

Financial Statements – Profit and Loss

Metro DC Chapter of ATD Profit and Loss January - December 2015

| | <u>Total</u> |
|--------------------------------------|-----------------------|
| | <u>Jan - Dec 2015</u> |
| Income | |
| 04-1000 Program - Talent Mgmt | 150.00 |
| 06-0000 Membership | 32,410.00 |
| 07-0000 Treasurer | 15.97 |
| 08-0000 Marketing & Communications | 4,424.16 |
| 09-0000 Career Development | 2,547.23 |
| 11-0000 Monthly Program Revenue | 14,394.00 |
| 16-0000 Professional Development Rev | 14,180.21 |
| 17-0000 Technology Revenue | 3,491.66 |
| 23-0000 Sponsorship Income | 800.00 |
| Total Income | \$ 72,413.23 |
| Gross Profit | \$ 72,413.23 |
| Expenses | |
| 01-0100 Administration Exp. | 27,566.38 |
| 04-0100 Program - Talent Management | 5,840.99 |
| 05-0100 SIGS Exp | 324.19 |
| 07-0100 Treasurer Exp | 250.00 |
| 08-0100 Marketing & Comm. | 94.80 |
| 11-0100 Program Exp | 33,205.60 |
| 16-0100 Professional Dev Exp | 8,183.36 |
| 18-0000 Technology | 11,556.91 |
| Total Expenses | \$ 87,022.23 |
| Net Operating Income | -\$ 14,609.00 |
| Net Income | -\$ 14,609.00 |

Financial Statements – Balance Sheet

Metro DC Chapter of ATD

Balance Sheet

As of December 31, 2015

ASSETS

Current Assets

Bank Accounts

| | |
|------------------------------------|-----------|
| 1021 Checking - Wells Fargo | 42,752.83 |
| 1022 Reserve Account - Wells Fargo | 37,788.03 |
| 1130 Cash on Hand/PayPal | 2,178.90 |

| | |
|----------------------------|---------------------|
| Total Bank Accounts | \$ 82,719.76 |
|----------------------------|---------------------|

Other current assets

| | |
|------------------------|--------|
| 1500 Prepaid Insurance | 76.70 |
| 1502 Prepaid - Other | 210.98 |

| | |
|-----------------------------------|------------------|
| Total Other current assets | \$ 287.68 |
|-----------------------------------|------------------|

| | |
|-----------------------------|---------------------|
| Total Current Assets | \$ 83,007.44 |
|-----------------------------|---------------------|

Fixed Assets

| | |
|-------------------------------|---------|
| 1600 Property & Equipment | 577.49 |
| 1610 Accumulated Depreciation | -411.00 |

| | |
|---------------------------|------------------|
| Total Fixed Assets | \$ 166.49 |
|---------------------------|------------------|

Other Assets

| | |
|----------------------------|-----------|
| 1650 Software | 4,103.00 |
| 1655 Software Amortization | -2,902.00 |

| | |
|---------------------------|--------------------|
| Total Other Assets | \$ 1,201.00 |
|---------------------------|--------------------|

| | |
|---------------------|---------------------|
| TOTAL ASSETS | \$ 84,374.93 |
|---------------------|---------------------|

LIABILITIES AND EQUITY

Liabilities

Current Liabilities

| | |
|-------------------------------|--------------------|
| Total Accounts Payable | \$ 1,500.00 |
|-------------------------------|--------------------|

Other Current Liabilities

| | |
|------------------------------|----------|
| 2115 Deferred Revenue - 2015 | 2,240.00 |
|------------------------------|----------|

| | |
|--|--------------------|
| Total Other Current Liabilities | \$ 2,240.00 |
|--|--------------------|

| | |
|----------------------------------|--------------------|
| Total Current Liabilities | \$ 3,740.00 |
|----------------------------------|--------------------|

| | |
|--------------------------|--------------------|
| Total Liabilities | \$ 3,740.00 |
|--------------------------|--------------------|

Equity

| | |
|-----------------|-----------|
| 3000 Net Assets | 95,243.93 |
|-----------------|-----------|

| | |
|------------|------------|
| Net Income | -14,609.00 |
|------------|------------|

| | |
|---------------------|---------------------|
| Total Equity | \$ 80,634.93 |
|---------------------|---------------------|

| | |
|-------------------------------------|---------------------|
| TOTAL LIABILITIES AND EQUITY | \$ 84,374.93 |
|-------------------------------------|---------------------|

Contact Information

For any questions about the 2015 Annual Report, please contact:



Stephanie Hubka
President
president@dcata.org



Christina Eanes
Past President
president_past@dcata.org



Company Information

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