



Annual Report 2010-2011

Hudson-Mohawk Chapter American Society for Training and Development

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American Society for Training and Development

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President's Letter

Dear Hudson-Mohawk ASTD Members,

Every year, the Board of Directors of the Hudson-Mohawk Chapter of ASTD produces an annual report for our membership. It is my pleasure to review the highlights of the year with you that include the following events and accomplishments:

- Maintained 100% CORE compliance that is in line with National ASTD requirements
- Continued the HMASTD Borrowing Library as a resource for members
- Created revenue through sponsorship, website and enewsletter advertising
- Partnered with professional organizations to network and share best practices
- Provided increased opportunities for our members to sponsor and host programs
- Transformed quarterly newsletter into an enewsletter that can be published at will without publishing expenses

Our Board of Directors is a hardworking, hands-on governing body. In addition to fulfilling their roles as board members, each serves on at least one other committee within our chapter. Together they pursued new programs and services in order to provide exceptional professional development to our membership.

Finally, our Chapter Administrator and Account Executive, Nancy Reilly, provides a professional face for our organization with daily interaction with both the membership and board of directors. We thank her for her commitment to quality and customer service.

In accordance with the chapter bylaws and operating requirements, I submit this Annual Report for the 2010-2011 program year.

Respectfully,



David S. Freedman, President (2003-2004; 2010-2011)
Hudson-Mohawk ASTD
October 2011

Board of Directors Report

David S. Freedman, President

CORE (Chapter Operating Requirements)

The Hudson-Mohawk Chapter complied **100%** with all requirements of the CORE report this year, making this ten years in a row. We are aligned with National ASTD operating requirements (NORE) and continued to support the National ASTD CORE mission: “Through exceptional learning and performance, we create a world that works better”, aiming to “be a world-wide leader in workplace learning and performance”. The Board participates in two retreats each year in which a portion is dedicated to supporting goals set forth by National ASTD.

Programs

This year Steve Russell planned a fantastic year of monthly workshops on innovative topics. Our members had many opportunities to network with other area trainers and consultants. Programs ran from September to June. This year’s profit was \$2,518.03, forty percent greater than the previous year, due largely to the venue and food savings.

Finances

Peter Perrone worked intensely to strengthen our balance sheet and ensure our funds were maximized throughout the year. All taxes were filed properly in a timely manner. This past year we had an external audit conducted by a CPA who found we are GAAP (Generally Accepted Accounting Principles) compliant. There were no recommendations or changes in how we keep our books.

Membership

As of June 30, 2011, our total membership was 137. We continued our “Program Reward Card” by awarding \$10 in “HMBucks” towards a member’s regular meeting if they attended 4 programs in the current 2010-2011 programming year.

Chapter Awards

At the April 2011 Annual Conference, Natalie Williams was awarded the HMASTD Trainer of the Year Award. Natalie is the Employment & Training Director at Washington County Economic Opportunity Council/Washington County EOC where she administrates programs funded under the federal Workforce Investment Act (WIA) and the New York State Department of Labor. New for this year, HMASTD recognized the HMASTD Training Organization of the Year. The 2011 recipient was the St. Peter’s Center for Education Training Team led by Denise Ringer with Keith Bemis, Cheryl Grosso, Christine McCarthy, Maureen Pierre, Suja Thomas, Penny Wall & Tricia Wendell.

Website Committee

Led by David Freedman, a new website vendor was hired and in the fall of 2010 a redesigned website was launched. This update enables the chapter to incorporate current technologies, many of them managed internally. We continue to use Eventbrite to handle online registration for our annual conference.

Two-Year Plan

The following goals continued to be addressed during 2010-2011:

- Provide value of membership
- Engage our members to assume more active roles within the organization
- Build strong relationships with other professional groups to provide added value and networking opportunities for our members
- Provide for future leadership through succession planning

Sponsorship

Nancy Reilly, continuing in her role as Account Executive, brought repeat sponsors to our Annual Conference and was also instrumental in attaining new exhibitors. The purpose of her role is to develop and maintain relationships with organizations that share the interests of HMASTD and to target contacts with current and potential advertising accounts. New this year, we gained two in-kind sponsors for our monthly workshops. We developed and maintained relationships with Sunmark Federal Credit Union to provide a different workshop venue and with Panera Catering to provide food and beverages.

Annual Conference

Led by Chair, Natalie Williams, the 16th Annual Workplace Learning and Performance Conference was held at the Albany Marriott on Wolf Road, in Albany, NY. This event generated \$3,431.92 in revenue for the chapter.

Account Executive Activities

Nancy Reilly brought in additional revenue from 14 job postings in the amount of \$700. Area companies paid \$50 per job, per month to have their job posted. These companies were pleased with the results and would post jobs with us in the future. An additional \$80 was earned from enewsletter advertisements. Nancy also secured Sunmark FCU and Panera Catering as workshop sponsors.

Board of Directors 2010-2011

David S. Freedman, President*
Kim E. Gander, Immediate Past President*
Peter Perrone, Vice President Finance *
Denise Mallow, Vice President Marketing
Martha McCormick, Vice President Membership
Stephen J. Russell, Vice President Programs
Natalie L. Williams, Vice President Special Events
Jill Bardwell, At-Large Board Member
Ann Lieberburg, At-Large Board Member
Alan Stern, At-Large Board Member (resigned 12/10)

* = member of Steering Committee

Chapter Administrator & Account Executive:

Nancy Reilly

Program Committee Report

Respectfully submitted by Nancy Reilly, Chapter Administrator

Between September 2010 and June 2011, we increased the length of our monthly workshops by ½ hour, giving speakers and participants more time to delve into each topic. Marketed as “workshops” we moved our venue from the Albany Marriott to the state of the art training room at Sunmark Federal Credit Union in Latham.

By partnering with Sunmark Federal Credit Union and Panera Catering, we were able to cut down on our monthly programming expenses. We thank Sunmark Federal Credit Union for opening their doors, allowing us the use their training facility and hi-tech audio-visual equipment. We also thank Panera Catering and their staff for providing us with quality food and excellent service.

We hosted two well received networking events which brought HMASTD members together with members from the Albany Capital District International Institute of Business Analysis Chapter, Upstate PMI Chapter, Consulting Alliance and CRHRA to discuss learning and development challenges.

We hope you will join us as we continue to bring area training professionals together at future workshops & special networking events.

Monthly Program Committee Report

Event Date	Topic	Presenter	Participants	Profit/Loss
September	Assessing Your Path to Success: Insights from Learning Industry Leaders	Panel: <ul style="list-style-type: none"> • Christine Katchmar, Assoc. Dean Continuing Education UMASS College of Liberal Arts • Sue O'Lena, The Research Foundation of SUNY • Gregory Enos, Time Communication Associates 	22	\$289.18
October	Innovation for Performance and Organizational Success: A Two Part Series for Energizing Change Leadership	Newell Eaton, Partner New & Improved	16	\$304.15
November	Energizing Innovation Teams: How to Spark a Culture of Innovation	Newell Eaton, Partner New & Improved	17	\$225.18
December	No workshop scheduled			
January Special Event	Workforce Performance Challenges in 2011	Groups: HMASTD, Consulting Alliance, UPPMI & IIBA	49	(\$76.80)
February	Even HR Plays a Role in Production: An introduction to Lean, Toyota Production and Root Cause Analysis	Michael Harrington New Directions Consulting	30	\$556.40
March	Project Management for Trainers	Art Fowler, CDPHP	29	\$435.11
April	No workshop due to Annual Conference			
May Special Event	Capital Region Networking Event	Groups: HMASTD, CRHRA, Consulting Alliance, UPPMI & IIBA	25	\$48.00
May	Points on the Board	Christopher Guldner, Consultant	14	\$126.34
June	Breaking up is Easy to Do – Modularizing Your Videos to Increase Learner Engagement	Chris Conto & Leanne Robinson-Maine New York Network	31	\$610.47
		TOTALS	233	\$2,518.03

Membership Committee Report

Respectfully submitted by Martha McCormick, VP Membership

Membership Mission

- To recruit new members while retaining current members
- To assess and respond to members' needs
- To communicate members' needs to Executive Board and other committees
- To renew pool of core leaders

Membership Summary As of June 30 2011

Individual Memberships: 77
Corporate Memberships: 60
Total Memberships: 137

(Joint HMASTD/ ASTD 43)

Membership Incentives

Program Reward Card – Program attendees receive a stamp on their card at each regular monthly program they attend. Four stamps are required in order to receive \$10 “HM Bucks” good for \$10 off any program except the Annual Conference.

Business Card Drawing – Program attendees are encouraged to place a business each month into a drawing to be held at the June meeting. The more programs they attend, the more cards they can submit. At the June meeting, a drawing is held for one person to win a HMASTD membership for the coming year.

Membership Programs

HMASTD Brochure Developed and Published - Newly designed tri-fold brochure was created and is able to be published on an as-needed basis at minimal cost to organization.

Power of 2 - National Power of 2 promotion was highlighted in enewsletter and other publications to emphasize value of joint membership.

Board Focus on Membership Effort – Board retreats in August 2010 and January 2011 focused discussion and planning on the need to increase local and joint membership with multiple initiatives planned and underway with the 2011-2012 board under VP Membership, Rue Heron.

Marketing Committee Report

Respectfully submitted by Denise Mallow, PHR – VP, Marketing

2010 – 2011 was a foundation year for the ASTD Marketing Committee. The committee met 3 times over the year and identified the following initiatives:

1. Target the North Country to identify businesses who may have Training Professionals, SME's, HR Professionals and Management who might benefit from the professional development and support HMASTD would be able to provide with an expanded presence in the North Country.
2. Develop a page on the website to showcase member businesses, training venues, training resources – this is an initiative that will come to fruition as we complete the final tweeks on our new website
3. Work closely with VP Membership to align our message for prospective members
4. Work closely with the Annual Conference committee, to insure a strong consistent message comes across in all public relations, printed materials and online
5. Reach out to membership to identify members who may be strong on the Marketing side to see if there is interest in working on the committee to share ideas and provide some succession for future years
6. Work closely with the Chapter Administrator to discuss new and innovative Marketing idea's

As we move into the 2011 – 2012 program year, the Marketing Committee will continue to evolve and build on the initiatives established in previous program year.

Annual Conference Committee Report

Respectfully Submitted by Nancy Reilly, Chapter Administrator & Account Executive

This year's Annual Workplace Learning and Performance Conference was held at the Albany Marriott Hotel on Wolf Road in Albany. Our committee consisted of 7 members including the Chapter Administrator.

Our keynote address was given by Author & Leadership Expert, Rob Moore. Rob has dedicated himself to helping others realize their potential and shared excerpts from his book *Show Up, Step Out & Shine*.

Mark Grimm, Communications Chair, sent press releases to 20 different outlets and appeared, with keynote speaker Rob Moore, as a guest on Forum 13, WNYT Channel 13.

Overall, the conference produced annual revenue of \$16,220.00 and profit to the chapter was \$3,431.92. The 2012 Workplace Learning and Performance Conference will again be held at the Albany Marriott Hotel in Albany on April 10, 2012.

Hudson Mohawk ASTD
YTD Income and Expense
 July 2010 through June 2011

1		<u>TOTAL</u>	<u>Budgeted Am't</u>
2	Ordinary Income/Expense		
3	Income		
4	Annual Conference 2011		
5	2011 Conference Attendance	11,740.00	
6	2011 Conference Exhibitor	3,600.00	
7	Conf Sponsorship	<u>1,240.00</u>	
8	Total Annual Conference 2011	16,580.00	20,000.00
9	Interest Income	18.42	48.00
10	Membership Dues Received		
11	Local Renewals	9,722.00	
12	New Local Members	<u>2,113.33</u>	
13	Total Membership Dues Received	11,835.33	11,475.00
14	Misc. Income	13.05	-
15	Monthly Meeting Revenue		
16	06-June 2010 POTM	155.00	
17	2010 09-Sep POTM	465.00	
18	2010 10-Oct POTM	510.00	
19	2010 11 Nov POTM	450.00	
20	2011 01 Jan Mixer	882.00	
21	2011 02 Feb POTM	850.00	
22	2011 03 Mar POTM	1,004.00	
23	2011 05-May Mixer	596.00	
24	2011 05 May POTM	284.21	
25	2011 06 Jun POTM	<u>870.00</u>	
26	Total Monthly Meeting Revenue	6,066.21	5,000.00
27	National Rebates (ChIPS)	130.35	300.00
28	Newsletter Revenue		
29	Ads	<u>160.00</u>	
30	Total Newsletter Revenue	160.00	75.00
31	Web Page		
32	job postings	<u>900.00</u>	
33	Total Web Page	<u>900.00</u>	450.00
34	Total Income	35,703.36	37,348.00
35	Expense		
36	Annual Conf 2010		
37	Bookstore exp.	<u>13.61</u>	
38	Total Annual Conf 2010	13.61	
39	Annual Conf 2011		
40	Conference Speakers	1,899.00	
41	Day Programs	290.00	
42	DayPass Wireless	29.48	
43	Hotel Charges	9,831.95	
44	HRCI Credit Fees	45.00	

Hudson Mohawk ASTD
YTD Income and Expense
 July 2010 through June 2011

1		<u>TOTAL</u>	<u>Budgeted Am't</u>
45	Presenters Costs	237.09	
46	Supplies and Copies	23.78	
47	Total Annual Conf 2011	<u>12,356.30</u>	11,850.00
48	Awards Committee		
49	Trainer Awards	224.00	
50	Total Awards Committee	<u>224.00</u>	100.00
51	Board		
52	Conf Committee Dinner	208.00	
53	Dues		
54	Board Member Nat'l dues	773.50	
55	Total Dues	<u>773.50</u>	417.00
56	Misc.		
57	Business Cards	60.00	
58	Copies/Printing	16.85	
59	Incidentals	11.40	
60	Total Misc.	<u>88.25</u>	
61	Recognition Awards	280.99	
62	Total Board	<u>1,350.74</u>	1,167.00
63	Chapter Administrator		
64	Bonus	500.00	
65	Contractor Hours	8,049.90	
66	Educational	169.00	
67	Sales Commission	1,862.25	
68	Total Chapter Administrator	<u>10,581.15</u>	13,250.00
69	EventBrite	297.76	-
70	Insurance	428.00	500.00
71	Marketing		
72	Albany C of C		
73	Chamber dues	350.00	
74	Total Albany C of C	<u>350.00</u>	
75	iContact Service	85.97	
76	Total Marketing	<u>435.97</u>	686.00
77	Membership		
78	Dues paid to National	3,812.33	
79	Total Membership	<u>3,812.33</u>	3,500.00
80	Monthly Meeting Expenses		
81	2010 09 Sep POTM	230.82	
82	2010 10 Oct POTM	205.85	
83	2010 11 Nov POTM	224.82	
84	2011 01 Jan Mixer	940.80	

Hudson Mohawk ASTD
YTD Income and Expense
 July 2010 through June 2011

1		<u>TOTAL</u>	<u>Budgeted Am't</u>
85	2011 02 Feb POTM	293.60	
86	2011 03 Mar POTM	324.89	
87	2011 05 May POTM	133.66	
88	2011 06 Jun POTM	259.53	
89	2011 May Mixer	576.00	
90	Total Monthly Meeting Expenses	<u>3,189.97</u>	2,500.00
91	Monthly Program Comm. Expenses		
92	Presenter Expenses	59.50	
93	Total Monthly Program Comm. Expenses	<u>59.50</u>	-
94	Office Operations		
95	Misc.	9.17	
96	Photocopying	150.00	
97	Postage	68.60	
98	Supplies	289.31	
99	Telephone	896.54	
100	Total Office Operations	<u>1,413.62</u>	1,250.00
101	Pay Pal		
102	Credit Processing Fees	590.05	
103	Total Pay Pal	<u>590.05</u>	465.00
104	Programs Expenses		
105	Monthly Mtg. Speakers Gifts	220.28	
106	Total Programs Expenses	<u>220.28</u>	300.00
107	Web Site		
108	Annual Hosting Fee	200.00	
109	Development	1,850.00	
110	GoDaddy.com	42.68	
111	Maintenance Fee	328.75	
112	Migration	150.00	
113	Tech Soup	17.00	
114	Upgrade	276.25	
115	Wild Apricot	270.00	
116	Total Web Site	<u>3,134.68</u>	1,175.00
117	Total Expense	<u>38,107.96</u>	37,160.00
118	Net Ordinary Income	<u>-2,404.60</u>	188.00
	Net Income	<u><u>-2,404.60</u></u>	188.00