

# 2018 Annual Report

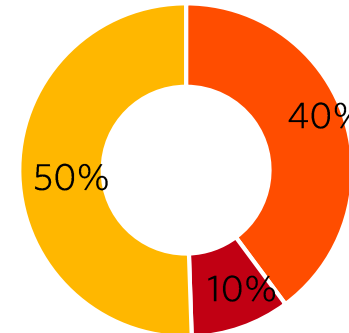
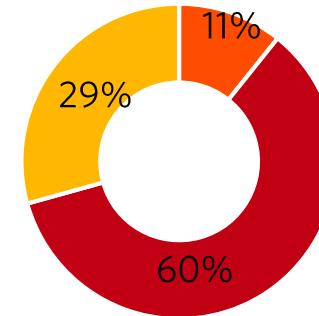


# Financial 2018



<b>Total Income</b>	<b>\$26,984</b>
Admin	\$2,900
Membership	\$16,173
Programs	\$7,909

<b>Total Expenses</b>	<b>\$21,651</b>
Admin	\$8,284
Membership	\$1,999
Programs	\$10,506



In 2018, we collected almost \$27,000 dollars in income. That income is made up of three main sources: Administrative, membership and programs.

- Admin: 11% - ATD National CHiP program; Job board postings; generous support from our sponsors
- Membership 60% - dues from new and returning members
- Program: 29% - workshops, and monthly meetings.

Our 2018 expenses were \$21,600 dollars.

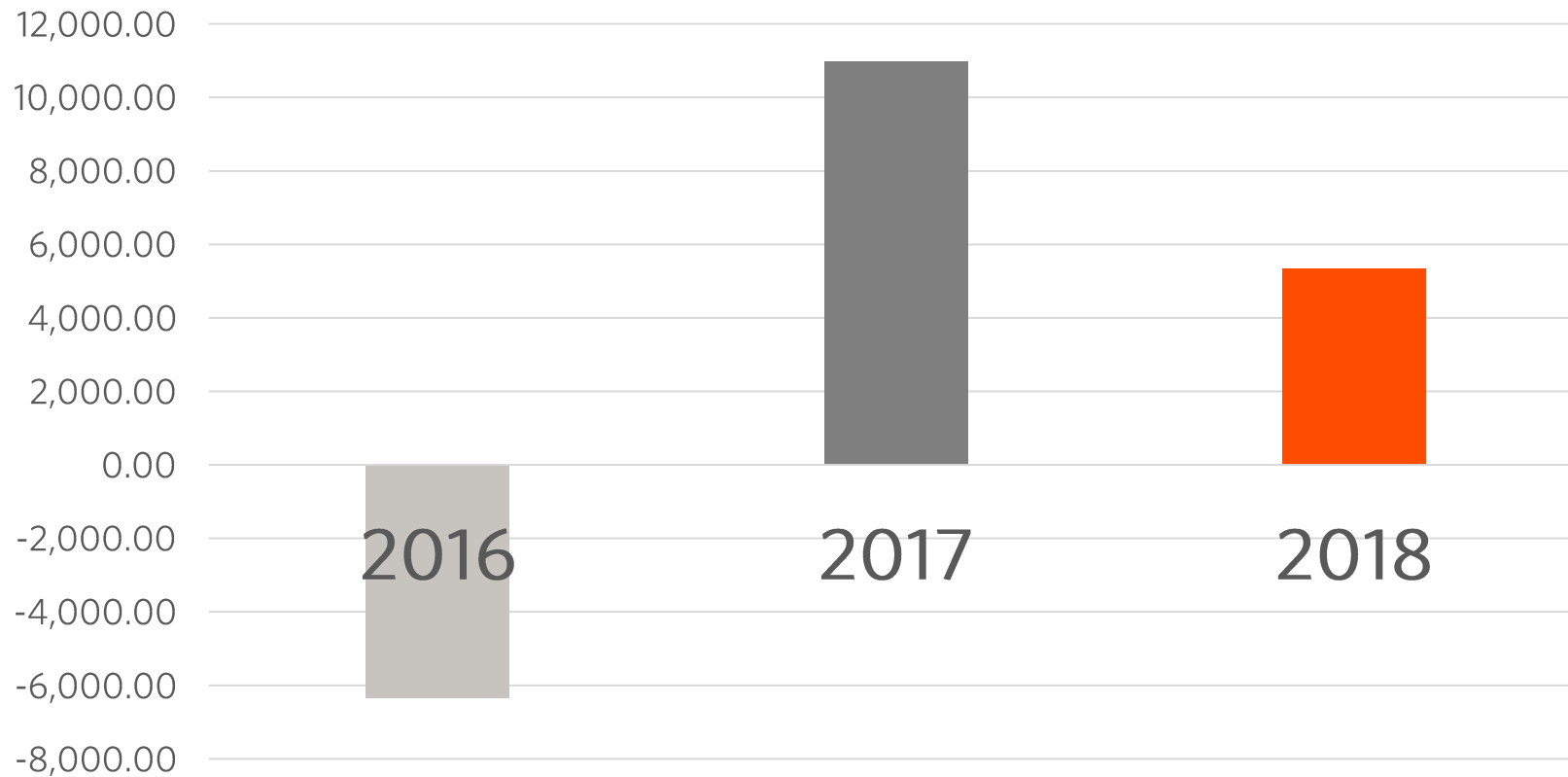
- Programs 50% - food and monthly meetings and workshop expenses
- Admin 40% - Paid administrator; attendance at ATD Leader Conference in Oct; website hosting and services
- Membership 10% - giveaways and membership reimbursements fees back to ATD National

Data as of December 31,2018

# Financial 2018



## Net Income



In 2018, our net income was \$5,300.

- Significantly less than the previous year. That's because in 2017, there was a big membership drive and we had 5 workshops.
- 2016 we had a net loss of \$6000.

Overall, our chapter is financially healthy. We brought in less income than we budgeted, but we also had fewer expenses.

# Membership 2018



# 225

Chapter Members

# 49%

Power Members



# 169

Individual Memberships



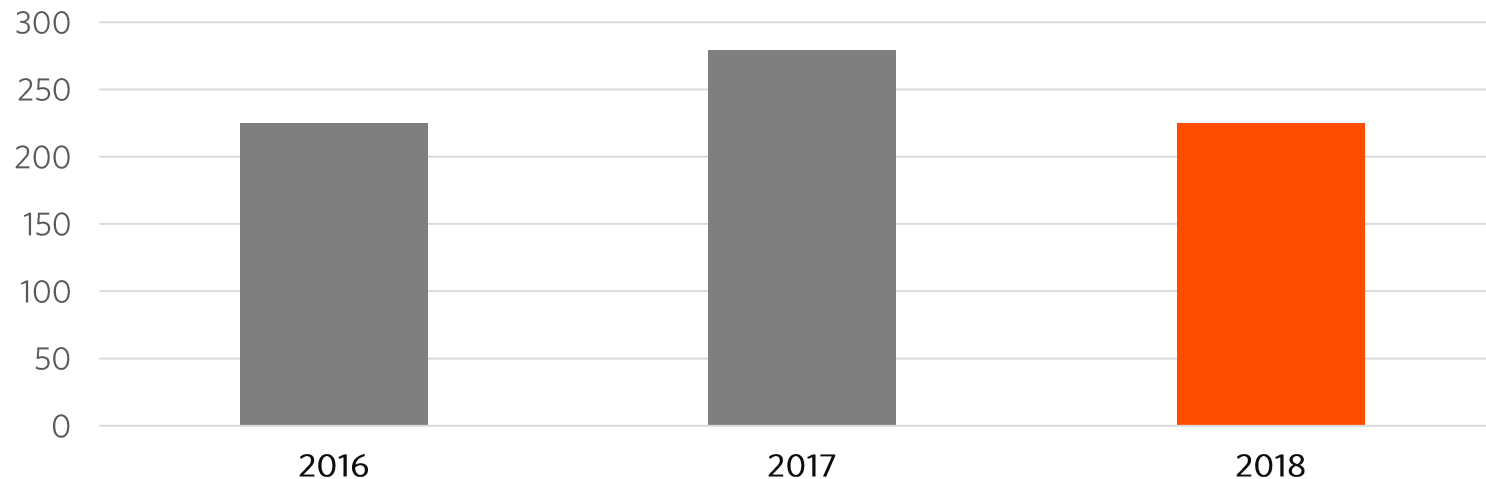
# 46

Corporate Memberships



# 10

Student Memberships



Next up, membership. ATD RTA ended the year with 225 members. Almost half of those members are Power Members - members who retain both National ATD and Chapter membership..

Membership breakdown:

- 169 individuals
- 46 corporate membership - 5 or more members from the same business or organization
- 10 student members - meet certain number of credit hours per semester

Looking at the trend of the previous two years, you'll see that we lost our momentum. But we're optimistic that we can move back in a positive direction.

The chapter lost members in 2018. The VP Membership role was vacant for the majority of the year.

# Programs 2018



44

Member Events

9 Monthly Meetings

26 SIG Meetings

5 Munch & Mingles

3 Workshops

1 Partner Event

Finally, we had 44 member events last year.

- 9 monthly meetings
- 26 Special Interest Group meetings
- 5 munch & mingles
- 3 workshop and
- 1 partner event

# 2018 Summary



## atd CARE

### chapter affiliation requirements

Across finance, membership and programming the chapter is doing well. But we did not achieve 100% of CARE in 2018.

Chapter Affiliation Requirements (CARE) are a set of performance guidelines designed to help chapters deliver consistent benefits to members. CARE consists of elements in five key areas that are necessary for running a chapter like a business: administration, financial, membership, professional development, and communication.

We missed:

- Creation of a succession plan
- Creation of a risk management assessment
- Completed 9 of a required 10 membership-related activities

# 2018 Summary



## Special Interest Groups



Learning Trends



Training 101



eLearning

In addition to chapter monthly meetings, we maintained three Special Interest Groups:

- Learning Trends
- Training 101
- eLearning

ATD RTA had three corporate sponsors: [TimelyText](#), [eParamus](#) and [Refresher Training](#).

Representatives from TimelyText and eParamus started a new recurring program for leaders within Learning and Development. This program focuses on discussions which target the needs of Executives and Leaders with direct reports.

ATD RTA has an agreement with Triangle Organization Development Network (TODN) and the International Coach Federation - Raleigh Chapter (ICF) where we can attend each other's events at a discounted rate.

## 2018 Sponsors



## Leader Round Table



## Partner Network



# 2018 Summary



**RESEARCH TRIANGLE  
AREA CHAPTER**  
Association for  
Talent Development

Contact the ATD-RTA Chapter

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ATD Research Triangle Area