



BAY COLONIES CHAPTER Association for Talent Development

2022-2023 ANNUAL REPORT



Letter from the Past President

ATD Bay Colonies Members,

Over the last year, ATD Bay Colonies absolutely leveled up! We pushed programming out of our comfort zone by leveling up our confidence with improv, leveling up our mental fitness, and leveling up our game with a soup-er in-person augmented reality race around Blount Fine Foods. We also leveled up some core L&D tenets such as coaching, universal design, and inclusive leadership. Bay Colonies expanded our networking opportunities, championed Crossroads RI with some bowling shenanigans, and introduced Bite-Sized Learning, a free virtual discussion anchored with content from Percipio and driven by our collaborative community.

It was exciting to get back to in-person certifications with a Gamification Workshop presented by Sententia. Shout out to everyone who earned their Level 1 Gamification Certificate and the over-achievers who are continuing their studies.

Perhaps the most exciting leveling up came in the form of our increase in membership. Like most chapters, our membership declined through the pandemic. We are proud to share that our membership has increased 44% over the last year. While the numbers are impressive, just wait until you meet the people behind them!

We have 2 longtime board members concluding their tenure as their terms end, Judy Nabb our VP of Volunteers, and Patrick Kelley our VP of Finance. Both have worked tirelessly in support of our chapter and their legacy will be an inspiration. Luckily, we'll be seeing them as members at future events.

Lastly, I would like to express my profound gratitude to you and the Bay Colonies Board for your support over the last couple of years. Being the President of the ATD Bay Colonies board has been an honor and unexpectedly leveled up my confidence. I am so excited about all the board has planned for the coming year and thankful to support as Past President.

With gratitude,

Wendy



Wendy Picard

IMMEDIATE
PAST PRESIDENT

2022 - 2023 ATD Bay Colonies Board of Directors



Wendy Picard
President



Patrick Kelley
VP of Finance



Brian Lopes
VP of Communication



Peter Ward
VP of Strategy



Heather Boyle
VP of Marketing



Lisa Robbins
VP of Membership



Catherine Thenault
VP of Operations



Michael Merline
VP of Professional
Development



Dayne Maloney
VP of Curation



Judy Nabb
VP of Volunteers

2023 - 2024 ATD Bay Colonies Board of Directors



Brian Lopes
President



Miko Nino
President-Elect



Wendy Picard
Immediate Past
President



Peter Ward
VP of Finance



Dayne Maloney
VP of Organizational
Strategy



Heather Boyle
VP of Marketing



Lisa Robbins
VP of Data & Analytics



Catherine Thenault
VP of Operations



Michael Merline
VP of Professional
Development



Elizabeth Neves
VP of Communication



Rodrigo Tempestini
VP of Member
Engagement

Financial Report

Gross revenue for Fiscal Year (FY) 22/23 was \$13,824 compared to \$4,222 in FY 21/22. The \$9,602 increase is primarily due to the return of live program events and a full day Gamification workshop. The chapter also received membership payment in Q1 of FY 22/23 from a partner company due in the FY21/22. The off-setting expenses for the Gamification workshop and travel expenses for the ALC meeting in San Diego, CA resulted in our chapter operating at a net gain of \$462. Our operating savings are strong and cover more than 1 year of operating expenses. We anticipate growth in our program revenue this year and are thankful to be back together more often in a live capacity.

Revenue \$13,824

A measure of the total amount of money received by the company for good sold or services provided.

Expenses to Revenue Ratio 96.66%

A measure of how efficiently the business is conducting operations.



Revenue
\$13,824

Total Costs
\$13,362

● Break Even Point
\$13,362

▲ Margin of Safety
\$462

Financial Report

The following is a breakdown of the top 3 expenses. The largest expense we had for FY 22/23 was the ATD Chapter Leaders Conference (ALC) which was held in San Diego, CA, this year and resulted in a higher travel expense than experienced in previous years. This is a conference for ATD Board Members across all chapters in the US. A selection of board members are chosen to attend each year. The second largest expense was the set-up fee and subscription for a new customer management system. Upon further review and a trial period the board made the decision to forgo the new system and remain with the existing one. A refund has been received and applied to FY 23/24. Finally, the third largest expense was the speaker fee for our full day gamification workshop in April. This was offset by the program revenue brought in. It is also worth mentioning that our food requirements for live program events were also greater this year. This is a welcome expense as it means we are meeting live again! We operated at a gain this year and were able to donate collected funds from our December holiday event to Crossroads Rhode Island. Thank you to all who supported!

Budget categories

Revenue Accounts		Expense Accounts	
Program Revenue	\$6,697.00	Travel	\$4,309.11
Membership Dues	\$6,093.33	Advertising	\$2,484.74
ChIP Income/ATD Awards	\$1,034.10	Speaker Fee	\$2,380.00
		Food Expense	\$1,029.58
		Meeting Location	\$ 836.16
		Donations	\$ 492.30
		Insurance	\$ 460.23
		Software Licenses	\$ 418.59
		Board Meetings/Retreat	\$ 258.55
		Merchant Credit Card Processing Fees	\$ 231.75
		ALC Registration	\$ 198.00
		Recognition/Raffles	\$ 125.00
		PO Box Rental & Postage	\$ 122.56
		Stationery, Printing, & Supplies	\$ 15.66

2022 - 2023 Goals

Goal	Description
Maintain CARE Plus Status	Fulfill all CARE requirements for 2022.
Sustain Community Outreach	Continued relationships and support of the local community.
Raise awareness of ATD benefits	Partner with National ATD to ensure our members are getting the most out of their membership; continue to explain Power Membership at events.
Collaborate with other Chapters to identify and share best practices	Attend monthly meetings with National Advisor of Chapters (NAC) and Board Members of other Chapters to discuss strategy in enhancing our members' experience. Reach out to other NE Chapter Leaders to share best practices in Finance, membership growth and retention, programing and planning.
Increase membership	Promote ATD Bay Colonies membership benefits with local businesses and L&D professionals. Develop a campaign to target specific businesses. Continue 'Get To Know Your Chapter' videos.
Increase networking opportunities	Schedule in-person meetings. Increase networking focus at in-person meetings using less structured event time and schedule virtual events to promote networking (ex. leveraging Percipio relationship for accountability lunch).

2023 - 2024 Goals

Goal	Description
Maintain CARE Plus Status	Fulfill all CARE requirements for 2023.
Sustain Community Outreach	Continue relationships and support of the local community.
Increase Engagement with Local L&D Professionals	Onboard members from companies who have not traditionally engaged with ATD Bay Colonies and reengage companies with low engagement over the past 5 years.
Coordinate Employee Learning Week Activities	Coordinate and promote activities related to Employee Learning Week, ATD's annual awareness campaign that highlights the important connection between learning and achieving organizational results, during the first full week in December.
Chapter Newsletter	Introduce a regular email newsletter to promote chapter events, celebrate chapter and member accomplishments, and share industry-related content.
Increase networking opportunities with other New England Chapters	Provide opportunities for members to establish connections outside of the chapter by offering a minimum of three events in conjunction with other New England Chapters.

2022 - 2023 Programming

September	Level Up Your Networking Programming year welcome and networking event at Ravenous Brewing in Cumberland, RI.
October	Level Up your Confidence with Improv Learn improv skills that will sharpen your command of the room.
November	Level Up your Mental Fitness Unpack the primary reasons you get hi-jacked by stress and discuss what's required to bring you greater happiness and well-being.
December	Charity & Cheer An exciting evening of networking and fun with proceeds benefitting Crossroads Rhode Island.
January	Level Up your L&D Skills Educating Neurodivergent People: Knowledge and strategies to create learning opportunities that offer greater cognitive access to ALL learners.
February	Level Up your Inclusive Leadership Power up the way we encourage and grow inclusive spaces: from the boardroom to the classroom and in any role you have in your organization.
March	Level Up your Coaching A hands-on workshop providing tips on how to enhance your coach-like skillset.
April	Level Up Your Game Take part in an augmented reality scavenger hunt and learn how gamification can be used to enhance learner engagement, motivation, and recall.
May	Level Up Your Team Culture Identify the culture you want on your team and how to reinforce it, celebrate success, and create opportunities.
June	The Final Level: YOU WIN Programming year-end celebration at Revival Brewing in Providence, RI.

2023 - 2024 Programming

Learnapalooza

2023-2024 FESTIVAL LINEUP

Presented by ATD Bay Colonies

SEPTEMBER - IN PERSON

TWO CHAPTER TWO-STEP

OCTOBER - IN-PERSON

NEW ENGLAND AREA CONFERENCE

NOVEMBER - VIRTUAL

CHATGPT FOR L&D

DECEMBER - IN-PERSON

CHARITY & CHEER

JANUARY - VIRTUAL

SHIFT HAPPENS

FEBRUARY - VIRTUAL

PSYCHOLOGICAL SAFETY

MARCH - VIRTUAL

ESCAPE YOUR LMS

APRIL - IN-PERSON

ACCESSIBILITY

JUNE - IN-PERSON

ONE! MORE! SONG!

SECOND
STAGE
FEATURING
BITE-SIZED LEARNING
OCT | DEC | MAR
APR | MAY

atd
BAY
COLONIES

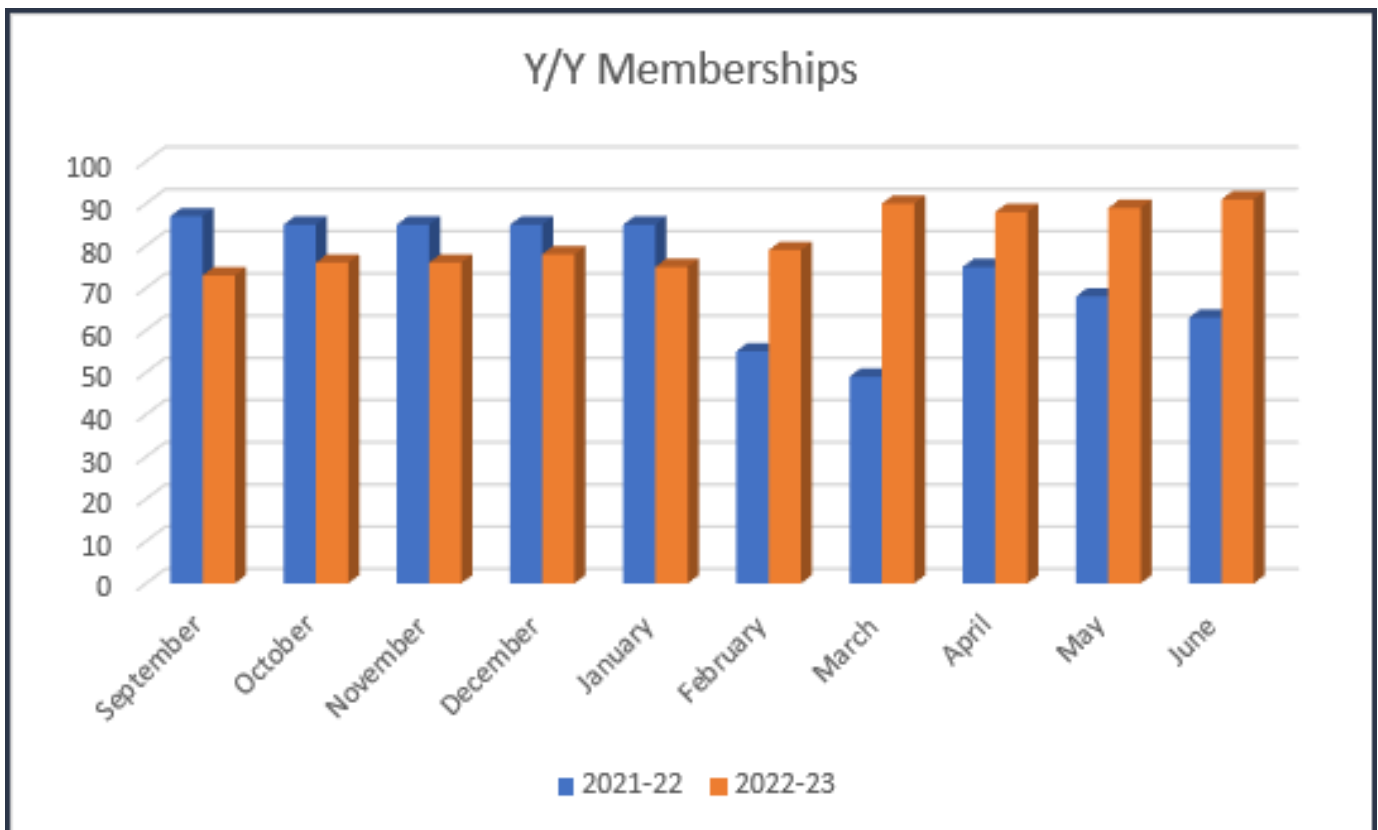
Tickets available at www.atdbaycolonies.org

Membership & Operations

Membership Numbers

Historically, we have had a solid membership base averaging between 80-90 members. 2021-2022 was a post pandemic drop in membership with an average 74 members (represented in blue below). While this is important to recognize, all local ATD Chapters experienced the same shift. We believed that our membership would bounce back once we are able to meet in person on a regular basis.

We are proud to announce that our membership did in fact increase from 73 members in September of 2022 to ending our season in June 2023 with 91 members (represented in orange below).



Orange represents membership numbers this year.

Membership & Operations

By the Numbers

Chapter Membership & Power Membership* Year over year

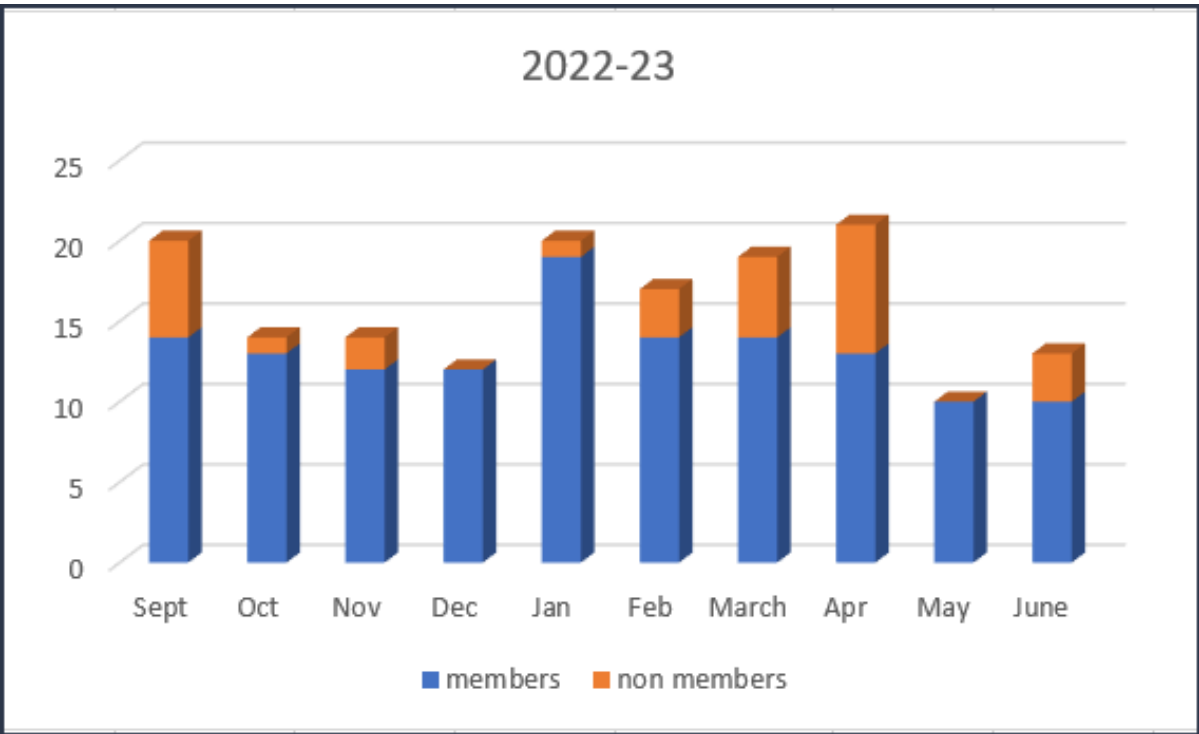
2021
Membership Average: 92
Power membership: 56
61%

2022
Membership Average: 74
Power membership: 48
65%

2023
Membership Average: 79
Power membership: 59
75%

**note – power membership is a Chapter Affiliation Requirement (CARE)*

Meeting Attendees Members and Non-Members



Communication & Marketing

Maintaining the chapter's tradition of adopting a yearly theme, in 2022-2023, ATD Bay Colonies embraced the theme "Level Up," infusing a gamified essence into our programming. Monthly promotions featured a pixelated interpretation of the theme in each graphic.

Leveraging LinkedIn as a cornerstone of our communication strategy, the chapter witnessed a remarkable 101% follower increase, attracting 224 new followers and 248 unique page visitors. The chapter struck a harmonious chord on social media, combining enjoyment with professionalism, and solidified a chapter elevator pitch. Post-event videos and testimonials shared effectively demonstrated the value proposition of ATD Bay Colonies membership. Finally, introducing the "Care to Share" LinkedIn group allowed members to exchange compelling articles and resources.

A highlight was the introduction of the branded Bite-sized Learning workshop series, a board-led initiative where Percipio eLearning modules were facilitated and discussed during lunch sessions. This offering, showcasing a valuable membership perk to participants, resonated well, evidenced by nine non-member registrations. The successful trial phase paved the way for expansion in 2023-2024.

The image is a collage of promotional materials for ATD Bay Colonies. On the left is a screenshot of the LinkedIn profile for 'ATD Bay Colonies', showing 409 followers and a 'Followers' analytics tab for the period of August 22, 2022, to August 21, 2023, with 224 new followers. To the right is a logo for 'BITE-SIZED LEARNING' featuring a red apple. Below these are several event posters with a pixelated, game-like aesthetic. The posters include: 1) 'LEVEL UP YOUR TEAM CULTURE' (VIRTUAL, Tuesday, May 16 from 1-2 PM, hosted by Wendy Hanson); 2) 'LEVEL UP YOUR GAME WITH CROSSTRAINER' (WEDNESDAY, APRIL 26 FROM 6:30-8:00 PM, BOUNTY fine foods, 630 CURRANT ROAD, FALL RIVER, MA); 3) 'LEVEL UP YOUR CONFIDENCE WITH IMPROV IN-PERSON' (WEDNESDAY, OCTOBER 26 FROM 8-9:30 AM, ZOO, ROGER WILLIAMS PARK, 1000 E. PROVIDENCE, RI); and 4) 'YOU WIN' (IN PERSON, WEDNESDAY, JUNE 14 FROM 5:30-7:30 PM, REVIVAL BREWING CO., 6000 ISLAND AVENUE, PROVIDENCE, RI).

Chapter Accomplishments



sharing our success

Sharing Our Success – February 2023

Achievement based on *Welcome Letter with Easy Links*.



Bite-Sized Learning

Introduction of facilitated lunch and learn discussion series.



chapter affiliation requirements

Achievement of CARE Plus

Recognition by ATD for 100% achievement of Chapter Affiliation Requirements (CARE).



Sententia Gamification Surveyor

(Level 1) Certification Workshop
One-day certification workshop held at Amica Insurance headquarters.



Current Chapter President, Brian Lopes, on Axiom Insights Podcast.

**Membership
increase 44%
year-over-year!**

Chapter Activities

Together again! Chapter activities in 2022- 2023 were a mix of virtual and in-person including 3 social events, an improv workshop at the zoo, and an Augmented Reality (AR) Jewel Hunt! Our December Charity & Cheer event included bowling and a visit from our friends at Crossroads Rhode Island.



Chapter Activities

