

EDA 7943: Field Study Reflective Paper

Submitted by: Lori Miller
Submitted to: Dr. Valerie Bryan
Date Submitted: November 14, 2011

The South Florida Chapter of the American Society for Training and Development (ASTD) formed a Palm Beach County Geographic Interest Group (GIG) in January 2010. In its inaugural year, I served as President Elect and Vice President of Programs. As of January 2011, I have been serving as the board President. This paper documents my reflections on the year and my learning experience, with particular focus to the past three months when this service has simultaneously been my FAU field study. It is worth noting the implied; because I was in a board leadership role, my FAU role as researcher has had its limits. *and delimits.*

Because the entirety of Palm Beach GIG's board of directors is voted in yearly, they continuously experience Tuckman's stages of forming, storming, norming, and performing. For the first two months of the year, the GIG was forming. Although there was strategic focus, the board members worked to build relationships with one another. Disagreements were rare, and the GIG seemed to operate to keep the status quo rather than move the board and work of the GIG ahead. *great comment!* *need to give reference for Tuckman's work (Tuckman, year)*

In March, a key board member, the Vice President of Administration, stepped down due to competing priorities. A new board member was quickly identified for this critical position. While the new board member was oriented to her position, other board members began to experience some of Tuckman's storming; it became clear that members were positioning themselves to best carry out the work of the GIG as well as their own personal agendas. For example, the VP of Membership quickly brought the new VP of Administration under her wing, knowing that this relationship would be critical to the VP of Membership's ability to meet her membership retention goals.

The GIG's storming was short lived and quickly moved onto norming. The GIG operated effectively and smoothly. Work was being done and the GIG was moving forward in achieving the goals set forth in its strategic plan's main focus of quality programming. In addition to hosting its bimonthly meetings, the GIG spearheaded a joint disciplinary conference with three other professional organizations.

Retrospectively, the GIG had entered its performing phase. However, I believe that although we were functioning and achieving our goals, the GIG board was not operating at its best. There were some serious issues with the new Vice President of Administration. Although she had been oriented to the new position, she was failing to fulfill her duties. She missed several board meetings with no notice, and the board was left to scramble and ensure her work was done (taking the minutes). Additionally, she failed to attend programs for which she was the person responsible for handling all aspects of registration both before and during. When I initiated a discussion* with her about this, she insisted that she was unaware of these requirements (although documentation proves she had received and signed off on the organizational bylaws). She stressed that she would do better, but was feeling overwhelmed by the loss of her job. Her number one priority was finding work. While I understood this, I suggested that she consider stepping down to allow herself the time she needed to focus on the job hunt. Because she was so insistent that she could handle seeking unemployment while not neglecting her board responsibilities, I gave her the benefit of the doubt and allowed her to continue on the board.

When several more missed board meetings and programs passed with other board members picking up the slack of the VP of Administration, I consulted with the board chair of

was a plan of action initiated as a form of agreement for her responsibilities to meet?

the South Florida board as well as the executive leadership of my team. I told them I was going to remove her from the board of directors. I had their full support, with several on my team stating that it was a difficult decision and not one they felt they would have the courage to make, but that it was what was best for the board. When I had the discussion with the VP of Administration, it was not pretty. She stated that I had "poisoned the board against [her]." Couldn't I understand her predicament? "Of course not, [I had] a job." I tried to rationalize with the VP, stating that I was sympathetic to her situation. However, she had failed to uphold any of her responsibilities associated with ASTD. Ironically, had she done so, she would be in a better position by having networked extensively with other professionals in the field. I reminded her of the bylaws outlining that being on the board required her to simply notify myself before a meeting or event that she was not going to be there so that I could ensure we had her work covered and were not left frantically covering up for her. Her notifications after the meetings were not helpful; of course, we knew that she was not there. While I appreciated the apologies for missing meetings and events retrospectively, they did nothing in terms of ensuring her duties were completed beforehand.

Although the board members still covered for the VP of Administration's work following her forced removal, I do believe we truly entered the performing state and were recognizing our full potential. Several board members thanked me for her removal. They were re-energized knowing that the board leadership recognized and acknowledged the work they were doing that was both their own and the VP of Administration's. They were more focused. We developed and implemented a transfer of learning survey to send to program participants 30 days after events to document whether or not they were implementing concepts presented.

We planned a free give back to the community event for January. When it came time to work on our succession planning, board members were actively engaged. The Director of Finance nominated herself for the critical VP of Administration role in 2012. Other board members signed on for another year of service and also identified new candidates who would enhance the board in the upcoming year.

When the new board was elected in late September, I prepared the outgoing and incoming board members to strategically plan for the year of work ahead in 2012. I led a discussion utilizing the ASTD Next Level tool. This assessment is included as another piece of my semester project. By determining and documenting our current baseline, the board was able to choose both reflect on our accomplishments as well as identify points of focus for ongoing work.

Throughout 2011, leading the ASTD Palm Beach GIG provided me with a valuable growth opportunity, both personally and professionally. Throughout each of the forming, storming, norming, and performing stages, I learned a great deal about group dynamics as well as myself as a leader.

Lori Miller

Field Study: EDA7943

Summary of GIG Assessment Using ASTD Next Level Tool

The American Society for Training and Development (ASTD) Next Level Tool is designed for local chapters to assess themselves as Emerging, Solid, or High Performing across six dimensions: communication, community outreach, financial, governance, membership, and professional development. Because the Palm Beach County Geographic Interest Group (PBC GIG) is in its second year, I felt it was important for us to complete this tool to benchmark where we are. Completing this tool and analyzing our results allowed us the opportunity to reflect on our progress and determine areas of focus as we move ahead into a new calendar year with a new board of directors. By completing the tool annually, we will also be able measure and document our progress. It is important to note that this tool is designed for Chapters as opposed to Geographic Interest Groups, although the board chose to complete the tool from a GIG perspective. Also, the South FL ASTD is piloting this tool for ASTD National. Therefore, there may be changes to the form in the future based upon feedback from the South Florida Chapter as well as the other Chapters involved in the pilot. Additionally, it is worth noting that as the GIG Board President, my role as a researcher for the purpose of this field study is limited.

The tool was distributed to board members at the August board meeting. Members were asked to complete the tool on their own before October's meeting. In October, board members partnered with each other to compare their assessments and come to a group consensus. There were no outlying perspectives; the board generally agreed upon the rankings within the dimensions.

In the dimension of Communication, the GIG board rated itself as Solid. The Chapter has a website with a GIG page which is updated at least monthly. Additionally, the GIG utilizes various social media outlets: Facebook, Twitter, and LinkedIn. While the board actively engages in the use of these tools to message program/meeting information as well as post training related content, our membership is not currently actively posting as well. Any acknowledgment as to why?

In the dimension of Community Outreach, the GIG board is Emerging. Although we do currently have a community outreach event scheduled for January 2012, to date there have been none. The board decided to not credit itself for the January event since it has not yet occurred.

In the dimension of Financial, the board is also Emerging. We primarily operate at break-even costs with the exception of the conference being a slight money maker. Of course, as a non-profit group, this is the expectation. We strive to keep costs down for members and participants. Additionally, we have little to no income beyond membership dues and program fees. I believe this criterion is one which relates more to Chapters than GIGs. Although both GIGs and Chapters can get sponsors, share events, etc., only Chapters can participate in the CHIP code funding provided by ASTD National.

In the dimension of Governance, the GIG rates as Solid. While we are 100% CORE compliant, we do not have it built into our operating plan. However, I see this as a function of the South Florida Chapter, of which the GIG is a part; CORE requirements do not pertain to GIGs. The GIG board positions are filled with leadership fully engaged. We meet monthly and have an annual retreat (which are High Performing indicators). We utilize volunteers (the entire board is volunteers with additional members at large) and resources such as the Next Levels tool from ASTD National.

Can you secure grants? are you non-profit?

In the dimension of Membership, the GIG is again Solid. Although there is currently no membership retention plan, the GIG does exceed the 30% threshold of joint (both national and local chapter) membership. Additionally, we offer at least one dedicated networking event per year for our members while also building networking time into each program.

In the Professional Development dimension, the GIG is Emerging. As a GIG, the expectations are not as stringent at those listed in the Chapter tool. For example, while the Chapter offers monthly programming, each GIG (Palm Beach County and Miami) minimally hosts 6 programs annually on alternating months. Similarly, although GIG leadership does participate in the ASTD Leaders Conference (ALC), Chapter Leaders Day (CLD), and the International Conference and Expo (ICE), these are at the expense of the leaders. Because the Chapter is capable of generating more revenue, they are able to send leadership to these events.

Having virtually all dimensions fall within the Emerging or Solid categories makes sense. The GIG is at the end of its second year. In order to build across dimensions, the GIG will focus on quality programming. By doing this, we will be able to become stronger in the membership and financial dimensions as well. Because the GIG's strongest area is Communication, we will use this strength and build on it to help enhance our focus. As demonstrated in Zenger's competency study, building on strengths increases performance across multiple dimensions (Zenger, 2011).

I suggest you do additional work regarding the origin of the tool and how it was created. You may be able to use as part of a literature review for future work in leadership courses. All of your leadership work in ASTD is addressed in head II, III, V, VI.

Works Cited

Zenger, J. (2011). *Developing strengths or weaknesses: overcoming the lure of the wrong choice*. Orem, UT: Zenger/Folkman.

ASTD Chapters Next Level Tool

Chapter Name: South FL PBC B16 Review Performed By: Lori Miller, B16 President Date: 10/14/11

Emerging Chapters		Solid Chapters		High Performing Chapters	Resources & Tools
Communication	<div><input type="checkbox"/> Has a chapter website but is not updated regularly</div> <div><input type="checkbox"/> Uses little to no social media channels, specifically Linked In, Facebook and Twitter</div>	<div><input checked="" type="checkbox"/> Chapter website is updated at least quarterly</div> <div><input checked="" type="checkbox"/> Uses at least one social media channel but members are minimally engaged.</div>	<div><input type="checkbox"/> Chapter website is dynamic, updated at least monthly, and features a variety of up-to-date information, development resources, and ways to connect members and community</div> <div><input type="checkbox"/> Uses all three suggested social media channels and has a dedicated resource focused on social media who reports to chapter leadership. Members are actively engaged in all three of the suggested social media channels for the chapter.</div>	<div><input type="checkbox"/> Chapter website is dynamic, updated at least monthly, and features a variety of up-to-date information, development resources, and ways to connect members and community</div> <div><input type="checkbox"/> Uses all three suggested social media channels and has a dedicated resource focused on social media who reports to chapter leadership. Members are actively engaged in all three of the suggested social media channels for the chapter.</div>	<div>• Communications Toolkit</div> <div>• ASTD Sharing Our Success (SOS) program</div> <div>• Wild Apricot</div> <div>• Free Content from ASTD</div> <div>• Follow @ASTDCHAPTERS on Twitter</div> <div>• Chapter Leaders' LinkedIn Group</div> <div>• Chapter Social Media Toolkit – coming soon</div>
Community Outreach	<div><input checked="" type="checkbox"/> No community involvement relationships established.</div>	<div><input type="checkbox"/> Chapter participates in at least one (1) community involvement relationship and activity per year.</div>	<div><input type="checkbox"/> Has a dedicated member resource focused on community involvement relationships who reports to chapter leadership. Chapter participates in a variety of community involvement activities and is known in the training community and business community.</div>	<div><input type="checkbox"/> Has a dedicated member resource focused on community involvement relationships who reports to chapter leadership. Chapter participates in a variety of community involvement activities and is known in the training community and business community.</div>	<div>• Chapter Community Relations Guide</div> <div>• Chapter Advocacy Toolkit</div> <div>• ASTD Public Policy site</div>
Financial	<div><input checked="" type="checkbox"/> Operates at break-even and has little or no reserves saved</div> <div><input checked="" type="checkbox"/> Chapter shows no or little income besides membership dues and meeting fees</div> <div><input type="checkbox"/> Overall chapter leadership rating for business acumen competency is 1 or 2</div>	<div><input type="checkbox"/> Breaks even or operates at a minimal gain annually. Has a minimum of six months reserves saved to cover operating expenses</div> <div><input type="checkbox"/> At least 20% of chapter income comes from things other than meeting fees and membership dues. Possibilities are: sponsorships, advertisements, CHIP code, shared events, expos, etc.</div> <div><input checked="" type="checkbox"/> Overall chapter leadership rating for business acumen assessment averages 3</div>	<div><input type="checkbox"/> Chapter has solid financial standing and a minimum of 12 months reserves saved</div> <div><input type="checkbox"/> At least 30% of chapter income comes from things other than meeting fees. Chapter has a dedicated resource to increase these opportunities who reports to the chapter leadership.</div> <div><input type="checkbox"/> All chapter leaders have been assessed to have a 4-5 rating on the business acumen assessment</div>	<div><input type="checkbox"/> Chapter has solid financial standing and a minimum of 12 months reserves saved</div> <div><input type="checkbox"/> At least 30% of chapter income comes from things other than meeting fees. Chapter has a dedicated resource to increase these opportunities who reports to the chapter leadership.</div> <div><input type="checkbox"/> All chapter leaders have been assessed to have a 4-5 rating on the business acumen assessment</div>	<div>• ASTD Sharing Our Success (SOS) program</div> <div>• Finance Toolkit</div> <div>• Business Acumen Assessment</div> <div>• Chapter Risk Assessment Leader Guide</div> <div>• Chapter Incentive Program (CHIP)</div> <div>• Chapter Survival Guide</div> <div>• Working with Vendors Toolkit</div> <div>• Incorporation Information</div> <div>• ASTD Group Tax Exemption Information</div> <div>• Certificate Partnership Program</div> <div>• Discount Partnerships</div>

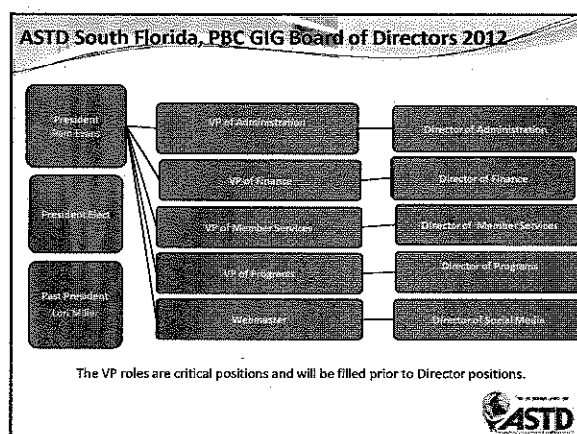
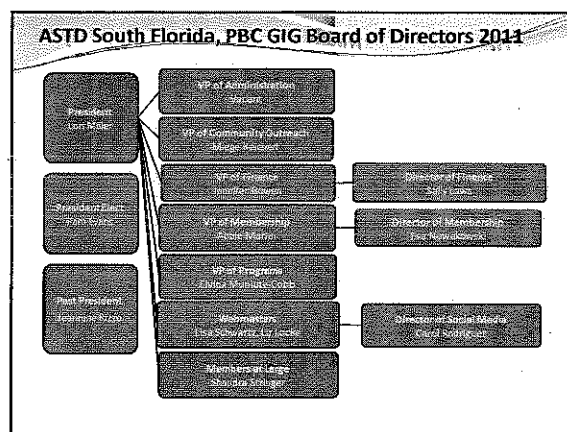
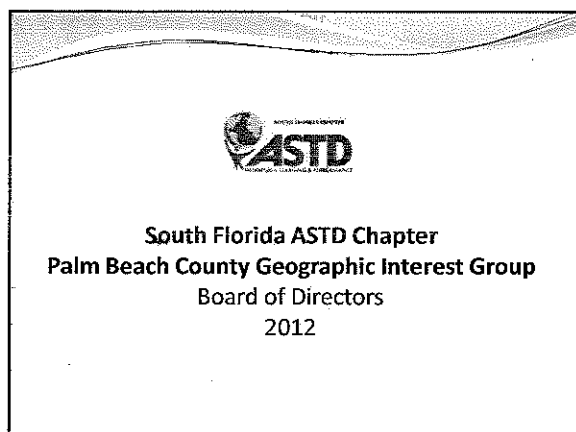
ASTD Chapters Next Level Tool

ASTD Chapters Next Level Tool			Resources & Tools	
Solid Chapters			High Performing Chapters	
Emerging Chapters			Resources & Tools	
Governance	<input checked="" type="checkbox"/> 100% CORE or has a coaching plan established to move to 100% CORE <input type="checkbox"/> All elected board positions are filled and board meets at least quarterly <input type="checkbox"/> Only a few volunteers are engaged in addition to the board; the board carries out all tactical and strategic issues. <input type="checkbox"/> Little interaction with other chapters and not aware of or does not use available resources from national ASTD (e.g., CLC, coaches, NAC, etc.)	<input type="checkbox"/> 100% CORE for multiple years; meeting all CORE requirements is part of operating plan <input checked="" type="checkbox"/> All board positions are filled and there are directors who answer to board members to carry out the tactical chapter plan through volunteers. The board meets at least 6 times a year. <input checked="" type="checkbox"/> The chapter recruits and uses volunteers, often to create a pipeline to board positions. <input checked="" type="checkbox"/> Uses available resources from national ASTD (e.g., CLC, coaches, NAC, etc.) and uses other chapters as resources. Occasionally submits an RFP to ALC or an SOS.	<input type="checkbox"/> 100% CORE for multiple years; meeting all CORE requirements is part of operating plan; often exceeds requirements and shares best practices <input checked="" type="checkbox"/> Board positions are filled and leadership is fully engaged; maintains a solid succession plan; board dedicates energy and resources to strategic activities. Board meets 10-12x per year with a board retreat annually. <input type="checkbox"/> Has a dedicated volunteer management position; actively recruits volunteers; members often volunteer at national level (e.g., NAC, CRC, Excellence in Practice reviewers, etc.) <input type="checkbox"/> Monthly communicates with Chapter services, Chapter coaches and NAC. Submits RFPs to ALC yearly; submits SOS 1-2x per year; is considered for chapter of the month. Partners with other chapters and cross-promotes events.	<ul style="list-style-type: none"> Chapter Coaches National Advisor for Chapters (NAC) Chapter Operating Requirements (CORE) CORE Element Matrix National Operating Requirements (NORE) ASTD Sharing Our Success (SOS) program Chapter Resources Mind Map Leader Connection Newsletter (LCN) Business Acumen Assessment
	<input checked="" type="checkbox"/> No membership goal or retention plan in place. <input type="checkbox"/> Membership turnover exceeds 30%. <input type="checkbox"/> Meets 30% annual joint membership requirement <input type="checkbox"/> No GIGs or SIGs <input type="checkbox"/> Little or no student or corporate membership <input type="checkbox"/> No planned networking opportunities for members	<input type="checkbox"/> Has an annual membership drive to recruit and also has a member growth and retention plan. <input checked="" type="checkbox"/> Membership turnover is 20-30%. <input checked="" type="checkbox"/> Exceeds 30% annual joint membership <input checked="" type="checkbox"/> At least one (1) GIG or SIG <input checked="" type="checkbox"/> >10% student and corporate membership <input checked="" type="checkbox"/> Offer at least one (1) networking event for members per year.	<input type="checkbox"/> Has an annual membership drive and retention plan. Has a formal new member orientation program and includes it at every chapter event. <input type="checkbox"/> Membership turnover is less than 20%. <input type="checkbox"/> Has 50% or higher annual joint membership <input type="checkbox"/> More than one (1) GIG or SIG <input type="checkbox"/> >15% student and corporate membership. Separate resource that answers to the board established for both Student memberships and corporate memberships. <input type="checkbox"/> Offer more than one (1) networking event for members per year. Structured networking activity at each program or event. Job board posted online.	<ul style="list-style-type: none"> ASTD Sharing Our Success (SOS) program Membership Management Toolkit Marketing Materials Request Customizable Marketing & Other Resources Value of ASTD Membership Messages National Member List Request Form Chapter Interest Group Toolkit Student and New Professional Idea Book National Benefits for Chapter Members Brochure Value of National ASTD Membership Flyer "Power of 2" national-chapter logo "Power of 2" Membership Presentation during Chapter Meeting "Power of 2" Customizable Templates Student Membership Flyer Membership Presentation during Chapter Meeting Chapter Awards Program Toolkit
Membership				

ASTD Chapters Next Level Tool

Emerging Chapters	Solid Chapters	High Performing Chapters	Resources & Tools
<p><input checked="" type="checkbox"/> Offers minimum of six (6) annual programs/events using only local speakers or chapter members</p> <p><input checked="" type="checkbox"/> Less than 35% of unique members attend events (each person only counted 1x per year).</p> <p><input checked="" type="checkbox"/> Chapter leaders do not participate in ALC, CLD, ICE chapter leadership sessions, or chapter leader webcasts or conference calls</p> <p><input checked="" type="checkbox"/> Less than 1% of the chapter members have the CPLP designation. Chapter does not promote CPLP</p> <p><input type="checkbox"/> Has never promoted or participated in Employee Learning Week</p>	<p><input type="checkbox"/> Offers >10 programs/events annually, occasionally using nationally recognized speakers; collects program feedback from participants</p> <p><input type="checkbox"/> 35% or unique members attend events annually.</p> <p><input type="checkbox"/> Sends one chapter leader to at least one (1) development event (ALC, CLD, or ICE chapter leadership sessions); several leaders regularly attend leadership webcasts or conference calls hosted by national ASTD</p> <p><input type="checkbox"/> 2-3% of the members have the CPLP designation; chapter promotes CPLP, and has at least one CPLP study group.</p> <p><input checked="" type="checkbox"/> Annually promotes Employee Learning Week</p>	<p><input type="checkbox"/> Offers >20 programs/events annually including webinars, conferences, and workshops and often uses nationally recognized experts; uses feedback from participants to plan future events</p> <p><input type="checkbox"/> 50% of unique members attend events annually. This suggests a strong marketing program to appeal to all the members in the membership and get them to attend at least one event/year.</p> <p><input type="checkbox"/> Sends 50% of chapter leaders to one (1) or more of any of the chapter leadership development events at ALC, CLD, or ICE chapter leadership sessions and most leaders regularly attend leadership webcasts or conference calls hosted by national ASTD. Some chapter leaders occasionally assist with focus groups, national committees, webcasts or conference calls hosted by national ASTD,</p> <p><input type="checkbox"/> 4% or more members with the CPLP designation; regularly promotes CPLP and provides opportunities for members to prepare for certification (e.g., CPLP study groups, prep resources library, mentoring, etc.) There is a resource responsible to the Board and helping members prepare for the CPLP.</p> <p><input type="checkbox"/> Annually promotes ELW and conducts at least one Employee Learning Week activity (ie: Proclamation from mayor or governor).</p>	<ul style="list-style-type: none"> • ASTD Sharing Our Success (SOS) program • ASTD Leaders Conference (ALC) • Onboarding Toolkit • Succession Planning Toolkit • Business Acumen Assessment • Chapter Leader Webcast & Podcast Schedule/Archive • Area Chapter Leaders Conference Toolkit • Employee Learning Week Toolkit • Chapter Program CPLP Recertification Validation Template • ASTD Competency Model • ASTD-Eventbrite Online Event Registration Service

participate but not chapter funded to do so.



2012 Job Descriptions

- Executive Board
 - President Pamela Evans
 - President Elect Eivina Muniute-Cobb
 - Past President Lori Miller

2012 Job Descriptions

- **President-Elect**
 - The President-Elect acts for the President in the President's absence. The President-Elect is responsible for implementing and evaluating the annual member survey, They shall serve as the chair of the Nominating Committee and facilitate planning in preparation for term as President.
 - The President-Elect must have previously served on the Board in a leadership position.

2012 Job Descriptions

- **Vice President of Administration**
 - The Vice President of Administration shall be responsible for recording and maintaining minutes of all business meetings and managing the on-site registration and check in process for chapter events.
- **Director of Administration**
 - The Director of Administration is responsible for assisting the VP of Administration with all processes.

2012 Job Descriptions

- Webmaster
 - The Webmaster is responsible for maintaining the website, including program and event registration.
- Director of Social Media
 - The Director of Social Media is responsible for distributing marketing for programs and events electronically (email, social media, etc.).



2012 Job Descriptions

- Vice President of Finance
 - The Vice President of Finance shall be responsible for the timely deposit of dues and other monies collected by the chapter, the timely disbursement of monies owed for Board approved expenses, and reporting on the financial condition of the GIG at meetings of the Board and at other times when called upon by the President.
- Director of Finance
 - The Director of Finance is responsible for assisting the VP of Finance with all duties.



2012 Job Descriptions

- Vice President of Member Services
 - The Vice President of Member Services is responsible for enhancing the individual member's relationship with the chapter, to include recruiting, welcome, member orientation, maintenance of the member database, and managing volunteers.
- Director of Member Services
 - The Director of Member Services is responsible for supporting the VP of Member Services by coordinating volunteers to assist at ASTD GIG events and assisting with other membership related duties.

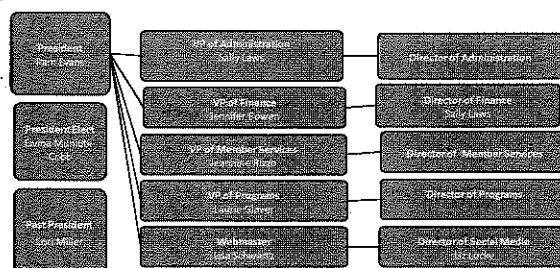
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2012 Job Descriptions

- Vice President of Programs
 - The Vice President of Programs is responsible for planning, implementing, and evaluating monthly programs, workshops, webinars, podcasts and vodcasts to assist members in their professional development. The VP of Programs also actively participates in the needs assessment process for the chapter.
- Director of Programs
 - The Director of Webinars is responsible for assisting the VP of Programs in all duties.



ASTD South Florida, PBC GIG Board of Directors 2012



The VP roles are critical positions and will be filled prior to Director positions.



2012 ASTD GIG Board

- If you are interested in being on the ASTD Board of Directors for 2012-2013, please contact Pamela Evans at evgroup@aol.com by September 30, 2011 to be added to the ballot.
- Voting for the GIG Board will take place at our Board Meeting on Monday, October 17, 2011 from 4:00 – 6:00 p.m. at CSC, 2300 High Ridge Road, Boynton Beach, FL. **Candidates are strongly encouraged to attend this meeting.**
- Board terms are for one year.
- Newly elected Board Members will be invited to the December 19, 2011 Board Meeting during which the outgoing and incoming Boards will celebrate the accomplishments of 2011 and brainstorm ideas for 2012.
- The Board meets the third Monday of every month (4th Monday in January, February, and September) from 4:00 – 6:00 p.m. Some meetings are face to face while others are held online.

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2012 Board Schedule

- 2012 Board Meetings:

4-6 p.m.

- Monday, January 23
- Monday, February 27
- Monday, March 19
- Monday, April 16
- Monday, May 21
- Monday, June 18
- Monday, July 16
- Monday, August 20
- Monday, September 24
- Monday, October 15
- Monday, November 19
- Monday, December 17

- 2012 GIG Programs to date:

5:30 – 7:30 p.m.

- Thursday, January 19
(networking event)
- Thursday, March 1
- Thursday, May 3
- Conference in June
(date TBD)
- Thursday, September 13
- Thursday, November 1



ASTD GIG: VP of Programs Duties for Each Program (not including conferences)

Several Months Prior to Program

- _____ Secure location for program
- _____ Select program topic based on evaluations, feedback, etc.
- _____ Identify speaker
- _____ Input information and send presenter Speaker Packet to complete (Give speaker deadline of at least 3 months prior to event)
- _____ When Speaker Packet is completed, send VP of Technology the program information including topic, date, time, location, speaker, photo, bio, and program summary for posting on website

One Week Prior to Program

- _____ Make necessary copies of presentation for speaker, if applicable
- _____ Get wireless login and password from location for registration (access to PayPal)
- _____ Confirm speaker's IT needs with location
- _____ Gather any additional items speaker has identified as needing, such as flip charts, etc.
- _____ Check in with presenter: Send presenter the number of registered participants the Monday before the event
- _____ Two days prior to event, confirm the number of participants with Northwood caterer
- _____ Update evaluation form
- _____ Make copies of evaluation form for participants
- _____ Secure raffle items for event for those who complete evaluations
- _____ Prepare upcoming program announcements for event, possibly produce flyer

Day of Event

- _____ Bring raffle items and evaluations to event
- _____ Arrive at location ½ hour prior to start time: check IT equipment, additional trainer needs, etc.
- _____ Ensure program runs smoothly
- _____ Announce upcoming programs
- _____ Introduce speaker with their 2 sentence intro they provided in Speaker Packet
- _____ Draw 3 completed evaluations for participants to receive raffle items
- _____ Send out evaluation link to participants

Event Follow Up (within 1 week)

- _____ Compile evaluations and share with GIG Board, lead discussion regarding lessons learned
- _____ Send speaker thank you with evaluation summary
- _____ Ensure we are invoiced for event and that invoice is accurate
- _____ Forward invoice to VP of Finance for processing

Transfer of Learning evaluation (1 month after event)

- _____ Send out TOL survey to event participants
- _____ Review and compile evaluations, share with GIG Board, lead discussion regarding lessons learned

Great checklist!

Date	Hours	Description
8/3/2011	2	conference call with Past President, President Elect, and potential future President Elect for 2012 regarding succession plan
8/15/2011	2	develop PPT presentation draft of succession plan
8/16/2011	2	prepare for board meeting, finalization of succession plan presentation
8/27/2011	4	attend South FL ASTD board meeting, update re: GIG activities
8/19/2011	3	board meeting: facilitate, take minutes
8/30/2011	1	create and send email blast regarding program on Thursday, set up auto email reminders from back end of website
8/31/2011	2	board meeting follow up: website videos, contact Northwood to confirm program, finalize and email minutes
9/1/2011	0.5	deal with unpaid FAU invoice for conference space, contact VP of Finance to see what is going on, follow up with Gayle Evans at FAU
9/1/2011	2	prep for program at Northwood: name tag, prepare comments, registration/monitoring list
9/1/2011	4	program at Northwood: Making Horses Drink
9/2/2011	2	program follow up: input payment data on backend of website, send speaker thank you, reconcile registration, send out evaluations
9/14/2011	1	develop and send agenda for board meeting
9/17/2011	2	develop transfer of learning survey/evaluation
9/19/2011	3	board meeting: facilitate, take minutes
9/22/2011	2	board meeting follow up: finalize and email minutes
9/27/2011	4	attend South FL ASTD board meeting, update re: GIG activities
10/1/2011	0.5	send TOL survey to September program participants
10/4/2011	1	participate in GIG webinar: Making Training Stick
10/11/2011	1	write ASTD article for TRAINER newsletter
10/12/2011	1	develop and send agenda for board meeting
10/14/2011	2	complete ASTD Next Level Tool for discussion at board meeting
10/17/2011	3	board meeting: facilitate, take minutes
10/18/2011	2	board meeting follow up: finalize and email minutes
10/27/2011	3	develop procedures for VP of Programs
11/2/2011	3	prep for program at Northwood: name tag, prepare comments, registration/monitoring list
11/3/2011	4	program at Northwood: e-Learning Best Practices
11/5/2011	8	participate in South FL ASTD board retreat: strategic planning for 2012

Total Hours

65

reflect on how much time spent on maintenance and how much time spent on moving chapter to H stage

South FL ASTD PBC GIG Transfer of Learning Survey



1. It's been a month since you attended the South FL ASTD Palm Beach County GIG's most recent program. Have you taken any steps to implement any of the concepts/strategies discussed in the program?

	Response Percent	Response Count
Yes	100.0%	4
No	0.0%	0
answered question		4
skipped question		0

2. If you answered yes, please briefly tell us about what you did.

	Response Count
	4
answered question	4
skipped question	0

3. If you answered no, please tell us why you have not taken steps to implement the concepts/training (i.e., lack of time, topic irrelevant to my work, can't figure out how to start, etc.).

	Response Count
	0
answered question	0
skipped question	4

4. Additional comments:

**Response
Count**

4

answered question

4

skipped question

0

1. The Facility and Food

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	Rating Average	Response Count
The location was convenient.	6.7% (1)	0.0% (0)	6.7% (1)	20.0% (3)	66.7% (10)	4.40	15
The facility was comfortable.	0.0% (0)	0.0% (0)	0.0% (0)	40.0% (6)	60.0% (9)	4.60	15
The food met my needs.	0.0% (0)	0.0% (0)	6.7% (1)	46.7% (7)	46.7% (7)	4.40	15
					answered question		15
					skipped question		0

2. Networking

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	Rating Average	Response Count
I had the opportunity to network.	0.0% (0)	0.0% (0)	6.7% (1)	40.0% (6)	53.3% (8)	4.47	15
					answered question		15
					skipped question		0

3. The Presentation

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	Rating Average	Response Count
The presenter was effective.	0.0% (0)	6.7% (1)	0.0% (0)	40.0% (6)	53.3% (8)	4.40	15
This program increased my knowledge and/or skills.	0.0% (0)	6.7% (1)	6.7% (1)	33.3% (5)	53.3% (8)	4.33	15
The content presented was relevant.	0.0% (0)	0.0% (0)	0.0% (0)	21.4% (3)	78.6% (11)	4.79	14
					answered question		15
					skipped question		0

4. What information was most valuable to you?

	Response Count
	15
answered question	15
skipped question	0

5. What specific action will you take to APPLY content from this program?

	Response Count
	15
answered question	15
skipped question	0

6. What improvement(s) can you suggest? Please explain.

Response
Count

10

answered question

10

skipped question

5

7. Is there anything else you would like to share?

Response
Count

6

answered question

6

skipped question

9

8. Enter your name for a chance to win a door prize.

Response
Count

12

answered question

12

skipped question

3

ASTD SFL Chapter Palm Beach GIG Event Evaluation - November 2011



1. The Facility and Food

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	Rating Average	Response Count
The location was convenient.	0.0% (0)	0.0% (0)	7.7% (1)	53.8% (7)	38.5% (5)	4.31	13
The facility was comfortable.	0.0% (0)	8.3% (1)	8.3% (1)	16.7% (2)	66.7% (8)	4.42	12
The food met my needs.	0.0% (0)	0.0% (0)	8.3% (1)	33.3% (4)	58.3% (7)	4.50	12
						answered question	13
						skipped question	0

2. Networking

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	Rating Average	Response Count
I had the opportunity to network.	0.0% (0)	0.0% (0)	0.0% (0)	53.8% (7)	46.2% (6)	4.46	13
						answered question	13
						skipped question	0

3. The Presentation by Dr. Art Johnson "Best Practices in E-learning"

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	Rating Average	Response Count
The presenter was properly prepared.	0.0% (0)	0.0% (0)	23.1% (3)	46.2% (6)	30.8% (4)	4.08	13
The presenter was effective.	7.7% (1)	15.4% (2)	23.1% (3)	23.1% (3)	30.8% (4)	3.54	13
The presenter encouraged participation.	0.0% (0)	0.0% (0)	15.4% (2)	38.5% (5)	46.2% (6)	4.31	13
This program increased my knowledge and/or skills.	0.0% (0)	30.8% (4)	30.8% (4)	15.4% (2)	23.1% (3)	3.31	13
The content presented was relevant.	0.0% (0)	7.7% (1)	38.5% (5)	30.8% (4)	23.1% (3)	3.69	13
answered question							13
skipped question							0

4. What are the three most important things that you learned today?

	Response Count
	13
answered question	13
skipped question	0

5. What specific action will you take to APPLY content from this program?

	Response Count
	13
answered question	13
skipped question	0

6. What improvement(s) can you suggest? Please explain.

**Response
Count**

9


answered question 9

skipped question 4

7. Would you recommend this program to others?

**Response
Percent Response
Count**

Yes  **53.8%** **7**

No  **46.2%** **6**

Why? **10**

answered question 13

skipped question 0

Q4. What are the three most important things that you learned today?

1	Some about best practices on e-learning	Nov 9, 2011 12:47 PM
2	e-Learning techniques and concepts	Nov 9, 2011 12:30 PM
3	NA	Nov 9, 2011 12:29 PM
4	Creativity helps transfer of learning. Instructors should be available at 3X per day for Q&A's.	Nov 7, 2011 2:41 PM
5	Nothing too much	Nov 7, 2011 12:21 PM
6	Glitz and glam need to aid the student.	Nov 7, 2011 10:18 AM
7	1) It's not about the bells and whistles ... it's about the learning. 2) Available software and resources. 3) Concept of virtual field trips.	Nov 7, 2011 7:27 AM
8	Good discussion on what adult learners want in a training. Hadn't thought about using Skype to record SME interviews and embed in trainings.	Nov 7, 2011 5:35 AM
9	I liked the handout that he gave with alot of information	Nov 6, 2011 3:41 PM
10	not much	Nov 4, 2011 1:38 PM
11	Some things from the audience members	Nov 4, 2011 1:14 PM
12	In a strange way, this was useful as a reminder of what we shouldn't do in live presentations and in elearning: Don't read, to your audience, what is on your slides and have copious amounts of text on slides. (Think "Beyond Bullet Points"/Cliff Atkinson.) Don't read an overly detailed two-page back-to-back handout to your audience. And, for God's sake, don't make people who are with you face to face listen to a recording of you reading your slides as our presenter did. I know this was meant to be an engaging demo of a real elearning module, but the format made the combination of live and "online" presentation redundant. A brief engaging sample up front would have been more effective.	Nov 4, 2011 12:53 PM
13	N/A	Nov 4, 2011 12:03 PM

*7 tremendous
comment*

Q5. What specific action will you take to APPLY content from this program?

1	Networking	Nov 9, 2011 12:47 PM
2	Analyze better these techniques and how they apply to my development	Nov 9, 2011 12:30 PM
3	NA	Nov 9, 2011 12:29 PM
4	Check out some of the websites recommended.	Nov 7, 2011 2:41 PM
5	I will explore more in depth podcast options for e-learning	Nov 7, 2011 12:21 PM
6	Use audio text and graphics more often.	Nov 7, 2011 10:18 AM
7	Retool current training to more seriously target the learning and its experiential aspects.	Nov 7, 2011 7:27 AM
8	Hard to say a specific action. It is more of a consciousness builder.	Nov 7, 2011 5:35 AM
9	Will keep his suggestions in mind while designing an online course	Nov 6, 2011 3:41 PM
10	I already apply it	Nov 4, 2011 1:38 PM
11	Look up those references	Nov 4, 2011 1:14 PM
12	I will continue to think about how to keep presentations engaging regardless of whether they are face to face or online.	Nov 4, 2011 12:53 PM
13	N/A	Nov 4, 2011 12:03 PM

Q6. What improvement(s) can you suggest? Please explain.

- | | | |
|---|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| 1 | Review the presentation before the meeting | Nov 9, 2011 12:47 PM |
| 2 | Time management. I think the content was OK, but I also think he needed more time to convey those best practices. | Nov 9, 2011 12:30 PM |
| 3 | Presenter should have either presented remotely or presented to group live. His voice tone on the recording was a monotone, needs to interject some feeling and emotion. | Nov 7, 2011 2:41 PM |
| 4 | Although the speaker emphasized the importance of "engagement", he himself appeared disengaged from the audience and disconnected. At times, the speaker was also little condescending, and approached the audience as from "the above". | Nov 7, 2011 12:21 PM |
| 5 | Share more best practices b-4 event from everyone. | Nov 7, 2011 10:18 AM |
| 6 | Was sorry that this training ended when it did. Would have enjoyed a longer period of time for discussion of the critical points distributed. | Nov 7, 2011 7:27 AM |
| 7 | I wish he would have had more time. I think everyone was willing to stay 15 minutes longer. | Nov 6, 2011 3:41 PM |
| 8 | Pretty much covered this in my answer to question 4. Want to emphasize that I really did like the presenter at a personal level, and he clearly is very knowledgeable about elearning, but the presentation was the antithesis of the topic being discussed in that it really could have been far more engaging. | Nov 4, 2011 12:53 PM |
| 9 | The promise of the invitation was not fulfilled. | Nov 4, 2011 12:03 PM |

good
comment -
happens a lot

Q7. Would you recommend this program to others?

- | | | |
|----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| 1 | Networking | Nov 9, 2011 12:47 PM |
| 2 | But he needs to be more effective. | Nov 9, 2011 12:30 PM |
| 3 | While I was unable to stay for the entire presentation, I was very disappointed that he showed a dvd as his presentation. I would have much preferred that he spoke to the points on the DVD and used the DVD as a tool rather than as his presentation. | Nov 9, 2011 12:29 PM |
| 4 | see above | Nov 7, 2011 2:41 PM |
| 5 | Great way to be reminded and knowledgeable of eLearning techniques. | Nov 7, 2011 10:18 AM |
| 6 | Valuable training, especially for those new to elearning or considering its implementation. | Nov 7, 2011 7:27 AM |
| 7 | It was a wonderful overview of elarning! | Nov 7, 2011 5:35 AM |
| 8 | Too basic for me. Violated some elearning principles actually and presupposed a blended setting. Would have been more helpful to me if it were content on making asynchronous more engaging honestly | Nov 4, 2011 1:14 PM |
| 9 | The topic needs to be presented in a way that highlights the best of online practices. | Nov 4, 2011 12:53 PM |
| 10 | See above | Nov 4, 2011 12:03 PM |

great
comments

Does the
instructors of these
events get
credit?
sheets.