

# A History of Our Chapter's Leadership and Accomplishments

The Southeastern Wisconsin Chapter was one of the first chapters of the American Society for Training and Development. In 1944, a group of training directors in Milwaukee and Madison formed the chapter. The chapter has grown in size and scope since its origin. Now our members come from business, education, community, and government organizations located primarily in Southeastern Wisconsin. Though we have changed and grown over the years, we are still committed to the goal that inspired our founders in 1944.

## *The Professional Growth of Members*

### **1944**

The Wisconsin Industrial Training Directors Association, which was the original name of ASTD, was organized on January 28, 1944 in Madison, Wisconsin.

President – C. P. McBride, Pabst Brewing Co.  
Secretary/Treasurer – H. E. Pulver, UW-Madison

The main concern of the WITDA at that time was the re-employment training of returning veterans of World War II. There were thirty-eight charter members.

### **1945**

President – Walter Hoover, Pressed Tank Steel  
Vice President- H. E. Pulver, UW-Madison  
Secretary/Treasurer – E. H. Givson, War Manpower Commission

A monthly paper was inaugurated entitled "Wisconsin Training Directors Association Training Tips."

### **1946**

Russ Moberly, Training Director, Industrial Supervision Institutes of Madison, requested that the WITDA co-sponsor an institute for Directors of Personnel and Industrial Relations. The subject for discussion was the Training and Upgrading of Workers in Business and Industry. Membership reached fifty.

### **1947**

The American Society of Training Directors was organized.

### **1948**

President – Frank Carney, Rueping Leather Co.  
Vice President – W. A. Nielson, Allis-Chalmers  
Secretary/Treasurer – Richard George, Oscar Mayer

WITDA became affiliated with ASTD. Committees were established at this time including the Program, Membership and Current Practices Committees.

### **1950**

President – Charles Pagnucco, Kohler Co.

Vice President – George Stromeck, Racine Vocational School  
Secretary/Treas. – Sherman Huebner, Kohler Co,

### **1951-52**

President – John Conway, AC Spark Plug  
Vice President – Don Snovembos, AC Spark Plug  
Secretary/Treasurer – William Rega, Falk Corp.

### **1952-53**

President – Don Snovembos, AC Spark Plug  
Vice President – Clayton Orcutt, Orcutt Industrial Engineering  
Secretary/Treasurer – Frank Walsh, Wisconsin Bureau of Personnel

### **1953-54**

President – Clayton Orcutt, Orcutt Industrial Engineering Co.  
Vice President – Norman Allhiser, Univ. of Wis.  
Secretary/Treasurer – John Heffinger, AC Spark Plug

### **1954-55**

President – Norman Allheiser, Univ. of Wisconsin  
Vice President – Mar Fritz, Pabst Brewing Co.  
Secretary/Treasurer – John Heffinger, AC Spark Plug

Membership totaled 98.

### **1955-56**

President – Charles Kendall, A. O. Smith  
Vice President – Robert Schindler, Globe Union  
Secretary – J. A. Haire, Schlitz Brewing Co.  
Treasurer – Norman Hundt, Milwaukee Gas Co.

A vote was taken on the question of re-naming WITDA to WTDA. The reason being many members were not now from industry but from sales and other fields.

### **1956-57**

President – James Haire, Schlitz Brewing Co.  
Vice President – William Fagerstrom, Wisconsin Power & Light

Secretary – Richard Toellner, Koehring Corp.  
Treasurer – William Froelich, Jr., Northwestern Mutual Life Insurance Co.

#### **1957-58**

President – William Fagerstrom, Wisconsin Power & Light  
Vice President – Meryl Doyle, Miller Brewing Co.  
Secretary – Tony Koenings, S. C. Johnson & Son  
Treasurer – Norman Olson, Wisconsin Power & Light

In December of 1957, James Landree of AC Spark Plug was appointed to fill the unexpired term of Secretary Tony Koenings.

#### **1958-59**

President – M. D. Doyle, Miller Brewing Co.  
Vice President – Donald Kirkpatrick, Management Institute, University of Wisconsin  
Secretary – Joseph Piechura, Schlitz Brewing Co.  
Treasurer – Gerald Gearing, Caterpillar Tractor

In December of 1958, Don Kirkpatrick was installed as President to fill the unexpired term of M.D. Doyle. The membership totaled 113.

#### **1959-60**

President – Donald Kirkpatrick, Management Institute, University of Wisconsin  
Vice President – James Landree, AC Spark Plug  
Secretary – Jordon Woods, Koehring Co.  
Treasurer – Gerald Gearing, Caterpillar Tractor

#### **1964-65**

President – Art Shanley, Nordberg Manufacturing  
Vice President – Joe Ginther, Marine Bank  
Secretary – Archie Broitzman, Milwaukee School of Engineering  
Treasurer – Tom Newman, Northwestern Mutual Life Insurance Co.

A speakers bureau was established and coordinated by Tom Newman. Fred Radtke and Harry Esser, charter members of the chapter, were elected chapter life members. Norm Allheiser, University of Wisconsin, was elected National Vice President of ASTD.

#### **1965-66**

President – Joseph Ginther, Marine Bank  
Vice President – Archie Broitzman, Milwaukee School of Engineering  
Secretary – Evelyn Hoppe, Allstate Insurance Co.  
Treasurer – Don Smith, Kohler Co.

(1965-66)

The Associations' name was changed from the Wisconsin Training Directors Association to the Wisconsin Chapter ASTD.

#### **1966-67**

President – Archie Broitzman, Milwaukee School of Engineering  
Vice President – Lou Seiberlich, Jr., A-C Electronics, Div. GMC  
Secretary – Tom Newman, Northwestern Mutual Life Insurance Co.  
Treasurer – Milt Rohm, Allis-Chalmers

One hundred and twenty people attended the annual institute.

#### **1967-68**

President – Louis Seiberlich, Jr., A-C Electronics, Div. GMC  
Vice President – Donald Doubeck, Ken Cook Co.  
Secretary – Robert Loppnow, Kohler Co.  
Treasurer – Donald Galbraith, Cutler-Hammer, Inc.

Don Kirkpatrick was elected Vice President of Region V ASTD. Jim Landree, Chair of the Research Committee, developed a research report entitled "Profile of a Wisconsin Training Director," which received a National Award from ASTD.

#### **1968-69**

President – Donald Galbraith, Cutler-Hammer, Inc.  
Vice President – Robert Loppnow, Kohler Co.  
Secretary – Robert Reiter, Cutler-Hammer, Inc.  
Treasurer – Jack Lynch, Wisconsin Telephone Co.

For the Chapter's 25<sup>th</sup> anniversary meeting in January 1969, the program speaker was Sidney Parnes from Buffalo State College in New York speaking on the topic of creativity.

#### **1969-70**

President – Robert Loppnow, Kohler Co.  
Vice President – Robert Reiter, Cutler-Hammer  
Secretary – Wayne Koehler, City of Milwaukee  
Treasurer – George Larscheid, Globe Union

The chapter hosted the first Region V conference in October of 1969. The chapter became incorporated.

#### **1970-71**

President – Robert Reiter, Cutler-Hammer, Inc.  
Vice President – George Larscheid, Globe Union  
Secretary – Tom Gajda  
Treasurer – Walt Korek, Superior Kutemeyer

#### **1971-72**

President – George Larscheid, Globe Union  
Vice President – Katherine Vernor, Gimbel Bros.  
Secretary – Paul Pagenkopf, Miller Brewing Co.

Treasurer – Neal Meitler, Organization Development Consultants

Bob Reiter was elected Region V Vice President. The Chapter received second place awards in membership growth and overall chapter achievement.

#### **1972-73**

President – Katherine Vernor, Gimbel Brothers  
Vice President – Paul Pagenkopf, Miller Brewing  
Secretary – Burt Wood, Milwaukee Board of School Directors  
Treasurer – Jude Werra, American Motors Co.

Ms. Vernor was the first woman elected to the Presidency of the Wisconsin Chapter. John Wrage, a charter member, was made a chapter life member, joining Cecilia Stanton, Fred Radtke and Harry Esser. Don Kirkpatrick was elected to be President of National ASTD for 1974. The first “Threshold to Professional Training” program was conducted in cooperation with the University of Wisconsin Extension. The Wisconsin Chapter again received a first-place award for overall chapter achievement.

#### **1973-74**

President – Burt Wood, Milwaukee Board of School Directors  
Vice President – Jude Werra, American Motors  
Secretary – Dana Warren, City of Milwaukee  
Treasurer – Tom Pagels, Kohler Co.

The chapter celebrated its 30<sup>th</sup> anniversary on January 24<sup>th</sup> with Jean Pearson, Executive Vice President of ASTD, as the program speaker.

#### **1974-75**

President – Jude Werra, American Motors Co.  
Vice President – Jim Hyland, Northwestern Mutual Life Insurance Co.  
Secretary – Will Strycker, Milwaukee Board of School Directors  
Treasurer – Gwen Jackson, Brills, Inc.

For the third consecutive year, the Chapter was named Number 1 in the country of all chapters its size. Burt Wood was elected Vice Chair of the Region V Council. Don Kirkpatrick served as President of National ASTD. Jim Hyland was awarded an Honorable Mention for the Torch Award by National for his service to the profession. The Chapter hosted the Region V Conference for

(1974-75)

the second time and 150 trainers attended the conference. Ray Fischer, Globe Union and Tom

Pelzek, Kohler, won Chapter awards for their programs.

#### **1975-76**

President – Jim Hyland, Northwestern Mutual Life  
Vice President – Will Strycker, Milwaukee Board of School Directors  
Treasurer – Ray Bedwell, St. Joseph's Hospital

The Chapter again received the first-place award for chapter excellence. A group of Past Presidents headed by Jude Werra prepared a plan for reorganizing the chapter to bring operations in line with recommendations in the Chapter Development Program. The first courses were conducted in the Associate Degree Program in Human Resource Development and Training Technology at MSOE.

#### **1976-77**

President – Will Strycker, Milwaukee Board of School Directors  
Vice President – George Kent, Allied Construction Employer's Association  
Secretary/Treasurer – Gwen Jackson, Brills, Inc.  
The Chapter again received the first-place award for overall chapter excellence. The reorganization was implemented, including president, vice president and secretary/treasurer. Chapter directors included programming, communications, professional development, community services, research and membership. A committee headed by the three most recent past presidents revised the Bylaws which were approved by the chapter during 1976. The chapter began to use a buddy-type system to welcome new members into the chapter. A human relations training program, headed by Helen Barnhill, Community Services Director, was developed and conducted to assist in implementing the integration program of the Milwaukee Public School System.

#### **1977-78**

President – George Kent, Allied Construction Employer's Association  
President-Elect – Gwen Jackson, Brills, Inc.  
Secy/Treas. – Mickey Pitner, Employers Insurance

The Chapter won awards for Chapter Achievement and Research and Development. Membership rose to 327. The first day school course in Training and Development was conducted at MSOE. A group of fifty Technical and Skills trainers was formed by Bob Reiter, Waukesha Engine Division.

#### **1978-79**

President – Gwen Jackson, Brills, Inc.  
President-Elect – Roy Cole, Cutler-Hammer, Inc.

Secretary/Treasurer – Virginia Hallman,  
Northwestern Mutual Life Insurance Co.

The Chapter won the National Membership Award in Region V for greatest growth increase; three national professional contribution awards in Research, Communications and Professional Development and Robert Reiter, of Waukesha Dresser, received the National Technical Trainer of the Year Award. Wisconsin Chapter also won a Regional Excellence citation. Sheila O'Shea was appointed as the Region V Representative to the National Women's Caucus and Gwen Jackson was elected to the Region's Secretary/Treasurer's position. The chapter celebrated its 35<sup>th</sup> anniversary.

#### **1979-80**

President – Roy Cole, Eaton Corp., Cutler-Hammer Products  
President-Elect – Ray Fisher, Johnson Controls/Globe Union  
Secretary/Treasurer – Sr. Celestine Schall, Alverno College

Three national professional contribution awards for Communications, Innovation and Professional Development were won during a year when chapter membership grew by over 100 new members. The Region V Conference was held in Milwaukee and received recognition by the Wisconsin Governor. A student chapter was created. A Wisconsin Chapter member, John Donovan of Johnson Controls Corp., was awarded one of six national "Torch" Awards and the Chapter won the Region V Excellence Award.

#### **1980-81**

President – Raymond Fisher, Johnson Controls  
President-Elect – Sr. Celestine Schall, Alverno College  
Secretary – Ray Bedwell, St. Joseph's Hospital  
Treasurer – Wayne Koehler, City of Milwaukee

Dues were raised from \$15 to \$25. Again, the Chapter won the Region V Excellence Award.

#### **1981-82**

President – Sr. Celestine Schall, Alverno College  
President-Elect – Larry Nelson, Measurable Performance Systems  
Secretary – Wayne Koehler, City of Milwaukee  
Treasurer – Virginia Hallman, Allis-Chalmers Credit Corp.

(1981-82)

The Chapter won the National ASTD Professional Contribution Award and the Region V Chapter Excellence Award. Membership reached 354.

#### **1982-83**

President – Wayne Koehler, City of Milwaukee  
President-Elect – Ron Bula, Univ. of Wis. Extension  
Secretary – Bonnie Schwid, Anagraphics  
Treasurer – Tom Munte, Advanced Systems, Inc.

The Chapter received three National Professional Contribution Awards for Programming, Membership and Communications. In addition, the Chapter received the Region V Chapter Excellence Award. Donald Kirkpatrick received the 1983 Gordon Bliss Award, the highest award that can be bestowed upon an ASTD member for outstanding contributions to the training profession. The Discovery Newsletter again won a national award. A committee position of Affirmative Action under the membership chairperson was established to recruit minorities for Chapter membership. A new special interest group on computer-based learning was organized in addition to the existing SIG groups – Idea Exchange, Tech Trainers, Women's Network, Participative Management and Sales Trainers.

#### **1983-84**

President – Ron Bula, Univ. of Wis. Extension  
President-Elect – Tom Munte, Advanced Systems  
Secretary – Michael Murnane, Curative Rehabilitation Center  
Treasurer – Karen Zoller, Milw. Metropolitan Sewerage District

The Chapter marked its 40<sup>th</sup> year of existence by earning two National ASTD Professional Contribution Awards (Community Service and Research) and the Region V Chapter Excellence Award

#### **1984-85**

President – Michael Murnane, Curative Rehabilitation Center  
President-Elect – Karen Zoller, Milw. Metropolitan Sewerage District  
Secretary – William Henderson, Allen-Bradley Co.  
Treasurer – Raymond Bedwell, St. Joseph's Hospital

(1984-85)

The Chapter fiscal calendar ran from August 1984 to December 1985. This was changed to a calendar year of January-December. The Chapter won the National Achievement Award in Membership, Communication and the Region V Chapter Excellence Award. Walt Brey won the Region V Award for Community Service. Life memberships were voted for Gwen Jackson and Milt Rohm in recognition of their lifelong contributions to the Wisconsin Chapter.

#### 1986

President – Karen Zoller, Milw. Metropolitan Sewerage District  
President-Elect – Janice Beutin, North Shore Savings  
Secretary – Daniel Mancini, Milwaukee Insurance  
Treasurer – Raymond Bedwell, Raymond T. Bedwell & Associates

*Discovery* was redesigned to be a more effective tool for the Chapter, which resulted in the Chapter winning an improvement award from Region V for 1986. Two new Special Interest Groups were formed: the Consultants SIG and a Student SIG at UW-Whitewater. The Chapter co-sponsored the Region V Conference with attendance at over 350.

#### 1987

President – Janice Beutin, North Shore Savings  
President-Elect – Raymond Bedwell, Raymond T. Bedwell Associates  
Secretary – Marilyn Griffin, Wisconsin Gas Co.  
Treasurer – Bill Henderson, Allen-Bradley Co.

The Chapter created its Vision and Mission Statements. The Chapter received the National ASTD Professional Development and Contributions to ASTD Awards. We also received an award from Region V for Professional Excellence.

#### 1988

President – Raymond Bedwell, Jr., Raymond T. Bedwell Associates  
President-Elect – Richard Huber, MATC  
Secretary – Jody Zanton, Wisconsin Gas Co.  
Treasurer – Dr. Walter Brey, Wis. Electric Power

October was declared Job Skills Month in Wisconsin. The Chapter took two National ASTD Chapter Awards in Professional Development and Contributions to ASTD and received a Region V Chapter Award for Professional Development. A permanent office address and phone number were established and the position of Chapter Information Coordinator was created.

#### 1989

President – Rick Huber, MATC  
President-Elect – Jody Zanton, Wisconsin Gas Co.  
Secretary – Patricia Gahl, Gahl & Associates  
Treasurer – Dr. Walter Brey, Wis. Electric Power

The Chapter's Position Referral Services were expanded to include a new Job Search-SIG.

#### 1990

President – Jody Zanton, Wisconsin Gas Co.  
President-Elect – Linda Jensen Brown, Business Communication Consultants, Inc.  
Secretary – Paul Smith, Measurable Perf. Systems  
Treasurer – Jerry Kluza, Kluza Associates

The Chapter hosted the Region V Conference, "Bridge to the Future." Distinguished Contribution to Human Resource Development/Training and Development field awards were received by Donna Bratonja and John Donovan, both of Johnson Controls, Inc. and by Kevin Wilde, GE Medical Sys.

#### 1991

President – Linda Jensen Brown, Business Communication Consultants, Inc.  
President-Elect – Jerry Kluza, Kluza Associates  
Secretary – Barbara Felix, Journal/Sentinel, Inc.  
Treasurer – Wil Brazeau, Findley Adhesives, Inc.  
The Chapter reorganized its special interest groups into seven professional practice groups. The foundation was laid for the "Train America's Workforce" initiative. The second annual institute was a huge success, offering valuable content and generating \$4,900 profit. Programming utilized the timely theme of "Quality in Training."

#### 1992

President – Jerry Kluza, Kluza Associates  
President-Elect – Pat Gahl, P. H. Gahl & Assoc.  
Secretary – Dana Butterfield  
Treasurer – Wil Brazeau, Findley Adhesives, Inc.

Chapter officer reporting relationships were realigned to improve focus on member service and provide clearer leadership succession paths. Bylaws were revised to facilitate the changes. Our membership database and financial reporting systems were computerized to insure efficient processing and consistent use from year to year. Our "Training Thresholds" program for new trainers was launched and the *Discovery* format was updated through self-directed work teams. "Train America's Workforce" became part of Community Service to strengthen its outreach to area businesses. Development began on a Wisconsin Chapter Awards Program to recognize a wider range of member achievements. We engaged the services of a professional Chapter Administrator.

#### 1993

President – Pat Gahl, P. H. Gahl & Associates  
President-Elect - Barb Felix, Journal/Sentinel, Inc.  
Secretary – Mary Wacker, M. B. Wacker Assoc.  
Treasurer – Ann Steinmetz Harris, Lawrence & Allen

A self-directed work team was established to oversee the publication of the *Discovery* newsletter. A Special Project Chair was added to the board for the first time and focused on increasing and coordinating volunteer efforts. Membership billing was transferred from the National ASTD office of our local Chapter Administrator. Community Services built a solid foundation of not-for-profit and private sector alliances. The institute offered an innovative program involving a half-day workshop and a theater troupe on the topic of empowerment. Programming developed a team of "meeting coordinators", and offered two half day programs on "Driving fear out of the workplace" and "accelerated learning."

#### 1994

President – Barb Felix, Journal Communications  
Pres.-Elect – Mary Wacker, M.B. Wacker Assoc.  
Secretary – Mike Pitcock, Wis. Electric Power Co.  
Treasurer – Ann Steinmetz Harris, Lawrence & Allen

A strategic planning process was begun to identify member needs and determine future direction of the chapter. Results of focus group sessions will guide strategies to be implemented in 1995. Programming introduced varied formats to address changing member interests. The Special Project Focus was the Annual August Institute on Interactive Multimedia based training. The Institute generated high response, favorable reaction and \$6,000 in revenue. The Institute plan was submitted to national for entry in the Chapter Management Awards program.

Membership instituted member surveys and non-renewal surveys, as well as a video tape library of chapter meetings. Community Services arranged for co-sponsorship along with the University of Wisconsin-Milwaukee, of the Annual Research-to-Practice Conference. Professional Development published a directory of academic programs relevant to training professionals, revised and promoted the mentoring program and instituted a professional book review group. Alliances with national and with other Wisconsin chapters were strengthened. In October, the first Inter-Wisconsin Chapter meeting was held in Fond du Lac, with representation of all four Wisconsin Chapters.

1995

President – Mary Wacker, M. B. Wacker Assoc.  
President-Elect – Mike Pitcock, Wis. Electric Power  
Secretary – Paul Carter, Johnson International  
Treasurer – Sharon Safar, Career Focus

Our Strategic Planning Process involving Board and chapter members resulted in revising our Mission, creating a Vision, and identifying four strategic focus areas: organizational structure, community visibility and credibility, volunteer development and member services. Action teams for each area identified goals and strategies. We created a new structure for an elected Board of Directors (9 positions) and appointed Committee Clusters (7 groups). The chapter membership will vote on the new structure in 1996. We presented a seminar on our new structure at the National Leadership Conference in Washington, DC to a positive reception. We drafted our first Chapter Operations Manual.

The *Discovery* team added an article recruiting position and created a new format for positive feedback on the professional content and look of the newsletter. Programming varied the format, timing and cost of the meetings in response to member requests. Meetings were held at a variety of business and community agency locations. Professional Development instituted the chapter's first Organizational Development courses. The Annual Institute of Accelerated Change had both national and local speakers generating positive response and revenues which will assist in funding strategic planning and chapter recognition. The second Inter-Wisconsin ASTD meeting was held in Fond du Lac on the topic of experiential learning. A new Interactive Computer Based Training and Support PPG was initiated, generating high interest and attendance. Membership created a monthly data tracking report and a four focus committee including outreach to prospective as well as current members. Member Services had a record number of contacts through position referral and created a new publication plan which will enable our Directory to be published earlier. We continue to add services through our very capable chapter administrator who handles billing, minutes, bookkeeping, meeting support, membership mailings and our database.

#### 1996

President – Michael Pitcock, Wis. Electric Power  
President-Elect – Maryjo Bartsch, Maryjo Bartsch M.S.  
Secretary – Joseph Gray, Johnson Controls  
Treasurer – Elaine Schmeda, Community Memorial Hospital

(1996)

The new structure for an elected Board of Directors (9 positions) and appointed Committee Clusters (7 groups) was put in place and approved by the chapter membership. The Chapter received membership approval to change the chapter's name to Southeastern Wisconsin Chapter of ASTD to better define our geographical area of influence. The membership also approved changes in the Bylaws necessary to incorporate the new board structure and name change.

One goal for 1996 was to increase the Chapter's visibility in the community as a recognizable resource for training and development expertise. To start off the year, Chapter members appeared on the Channel 10/36 PBS TV auction. We co-sponsored a Leadership Program with Metro Milwaukee Association of Commerce (MMAC). The chapter is presently working in a joint effort with Marquette University and National ASTD to establish a Trainer's Certification Program. For the third year, we were involved with a successful Inter-Wisconsin ASTD meeting on the topic of Accelerated Learning held in Fond du Lac. Our Chapter co-sponsored with the Human Resource Management Association (HRMA) the Annual Institute which presented a timely topic, "Effects of Downsizing in the Workplace" with two keynote speakers who are authors and experts in the area of downsizing.

We continue to strive to improve our member involvement and member service. We established the Customer Relations/Volunteer Involvement Committee to provide services for our members and provide opportunities for them to serve short duration assignments on various projects and committees. A process was established which encourages members to submit their names for Chapter leadership positions using an application form mailed with the July *Discovery*.

Our first Chapter Operations Manual was presented at the November transition board meeting. The manual details all of the Board and committee positions, duties, responsibilities and expectations.

#### 1997

President – Maryjo Bartsch, Maryjo Bartsch, M.S.  
President-Elect – Elaine Schmeda, Community Memorial Hospital  
Secretary – Mary Buchel, Buchel and Associates  
Treasurer – Ann Heidkamp, Milw. Area Technical College

(1997)

The Board and Committee Chairs committed themselves to accomplish specific action steps that were part of the Chapter strategic plan. The PR/Marketing committee updated and redesigned the chapter marketing brochure. Customer Relations and Membership led a cross-functional team that designed and conducted a member satisfaction survey. The Program and Professional Development committees and other volunteers offered to our members 7 chapter program meetings, Thresholds to Training, the Institute on Skills and Strategies for the New Millennium, and the 4<sup>th</sup> annual Inter-Wisconsin ASTD meeting. The Member Services Committee changed the deadline date for the directory with a goal of December delivery to members. A new PPG focused on the Worldwide Web was approved by the Board.

The board wrote, updated, and uniformly formatted chapter policies into a chapter policy manual. An internal audit of chapter financial records was performed. The chapter submitted itself to ASTD National for CHART (Chapter Assessment and Recognition Tool) approval.

#### 1998

President – Elaine Schmeda, Community Memorial Hospital  
President-Elect – Donna Burdge, Columbia\*St. Mary's Inc.  
Secretary – Bonnie Gauger, BNY Clearing Services  
Treasurer – Ann Heidkamp, Milw. Area Technical College

Board focus for the year was a commitment to Customer (Member) Service, while continuing to move forward with our Chapter's strategic plan. Our 1998 strategic goals, with our results follow: 1) *To be more visible in the business community and the community at large, as a provider of worthwhile services.* Programming Committee collaborated for several chapter program meetings with Marquette University and Milwaukee First in Quality. The Board initiated dialogue with UWM-Outreach for ongoing collaborative opportunities. Professional Development designed a web page for our chapter. Member Services developed and offered an ASTD Business Sponsorship membership/support option. 2) *To increase volunteer involvement and leadership among all segments of the membership.* Each of us currently has the opportunity, on our membership profile, to volunteer to provide community presentations. Public Relations/Marketing is in the process of developing consistent names for the many possible professional volunteer areas. Our Chapter

(1998)

Administrator will add them to our membership database for easy reference when requests come in. The Board regularly reviewed the names of members who volunteered, via the membership profile, for committee/project work. Committee chairs called each volunteer relative to their area of interest and got them involved, as appropriate. 3) *To use demographic and membership satisfaction information to plan the appropriate professional development and program level mix for the total chapter and specific membership populations.* Programming committee used the results and suggestions from our membership satisfaction survey in their planning of chapter program meetings. They offered six of them, on a variety of topics that spanned the breadth of training and development professionals' interests. In addition, Threshold to Training and the 5<sup>th</sup> Inter-Wisconsin Meeting (Improvisational Theater) were held. A special task force looked at the unique needs of our Advanced Practitioners. Communications published 10 informative and professional issues of *Discovery*, which was acknowledged for its quality by our area ASTD Director. Member Services published this 1999 Membership Directory and provided position referral services to members. Board members sampled the membership and called individuals for feedback and suggestions. Ideas generated by the calls continue to be used in planning. Our Professional Practice Groups offered members in-depth, specialized professional development on a regular basis: CBT/Multimedia (newly named "Learning Technologies") PPG, Organization Development PPG, Technical & Skills Training PPG and Worldwide Web PPG. 4) *To attract/encourage diverse membership.* The Board established a student ASTD chapter at Marquette University. Membership conducted a year-end membership drive; they also regularly oriented new members before chapter program meetings. Professional Development created a chapter web page, which will enable a diverse audience to join our professional organization.

Lastly, on the administrative side, the Southeastern Wisconsin Chapter of ASTD received the CHART award from National ASTD, acknowledging our chapter's management for 1997.

President - Donna Burdge, Columbia♦St. Mary's, Inc.

President Elect - Cheryl Lucas

Secretary - Bonnie Gauger, BNY Clearing Services

Treasurer - Mark Borowski, Adult Learning Services

The 1999 Board continued to focus on the Chapter's strategic initiatives.

*To be visible in the business community and the community at large:*

- The SE WI Chapter ASTD collaborated with other community organizations, such as MMAC, HRMA, MRA, and UWM, and other Wisconsin ASTD chapters in our planning and programming.
- The UWM Certificate Program was implemented—a four-part certificate program sponsored by UWM and ASTD.

*For the Southeastern Wisconsin Chapter and its members to be considered a resource of choice by the media on workplace learning issues:*

- A Showcase event, planned for March 2000, will highlight resources and vendor services available in our area.
- Our chapter collected data on membership profiles relative to areas of expertise.
- The Member Services Committee established a position referral service.

*To increase volunteer involvement and leadership among all segments of the membership:*

- Members were contacted by board members and committee chairs to match volunteers with opportunities for leadership.

*To use demographic and membership satisfaction information to plan the appropriate professional development and program level mix for the total chapter and specific membership populations.*

- A member survey was conducted by the Membership Committee through *Discovery*.
- Based on feedback, the Program Committee provided learning opportunities and membership activities at organization locations on a variety of subjects related to training and development.

*To have a diverse membership:*

- Board members began process of calling members who had not renewed their membership to collect data re satisfaction.
- Another communication tool, the chapter website—<http://users.gdinet.com/astd> -- became a reality in May, 1999 offering something for everyone.

President – Cheryl Lucas, MRA-The Management Association, Inc.  
President Elect – Susan Goudreau, M & I Data Services  
Secretary – Susan Schoenfeld, Foley & Lardner  
Treasurer - Mark Borowski, The Learning Interface

The 2000 Board of Directors embarked on a journey of looking at the chapter from the "outside-in". Looking for ways to make the SE Wisconsin Chapter the best it can be. One way to do that was through a strategic planning process. The Board met several times to discuss ways to better meet the needs of our members. We decided to do this in several ways:

- 1) Through a collaborative method--the UWM/ASTD Practitioner Survey. The survey was developed to further understand the needs of the current membership.
- 2) Research other ASTD chapters and compiled a list of trends and tactics other chapters have used to increase membership.
- 3) The Board held focus groups to assess membership satisfaction and identify improvement opportunities
- 4) Contracted with an external marketing firm to assist in researching other associations similar to ASTD to determine how they are serving training professionals and incorporate new trends and ideas to improve our chapter program and services.

Our ultimate goal is to ensure that our chapter is and will continue to meet the needs of its members by embracing technology, offer quality programming and provide access to resources to help us stay ahead in the changing world of "Training."

## 2001

President – Susan J. Goudreau, Learning4Success  
President Elect – Mark Borowski, The Learning Interface  
Past President – Cheryl Lucas, MRA  
Secretary – Dorothy Johnson, T&D Consulting  
Vice Presidents – Chris Fuchs, Marti Cargile, Tom Dybro, Ruth Gonsky, Lynn Carey

During this year the Board focused heavily on strategic planning for future growth in membership and services for the Chapter. It was a year where the plan was created and we used the services of  
(2001)

Barbara Markoff to facilitate the development of the goals and action items associated with the Plan.

During this year the board focused on key priorities to drive and support their strategic plan.

1. Revenue
2. Increase Volunteers
3. Feedback process/evaluations
4. Board re-structuring to be more efficient

The Chapter priorities were as follows:

1. Program focus/advisory group on experienced members, plus OD
2. Discovery on-line, web site expansion
3. Networking, group activities, sharing ideas

### Accomplishments:

- To achieve the priorities – goals were established in various key areas for the year. Membership, Volunteerism, Organizational Structure, Revenue, and Programming. These goals involved dollars to achieve, number of people to recruit, and recommendations to be made.
- ADVISE was formed to focus an experienced Training/OD group as a consult to the ASTD Board for ideas, advise, and growth.
- Several good programs that year and had Dr. Gary Schuman in to talk about Leadership Strategy.
- Mark Borowski was selected to speak at the National Leadership Council with Barbara Markoff on the topic of Strategic Planning for Local Chapters.
- ASTD Website went through major redesign and we started the posting process for new businesses to list open positions.
- This year was an opportunity for continued growth and change. We hired a market research firm to research other non-for-profit organizations and determine benchmarks of information we can use to improve our chapter.

## 2002

President – Mark Borowski, The Learning Interface  
President Elect – Dorothy Johnson, T&D Consulting Group  
Secretary – Kit Behling, The Training Kit  
Treasurer – Chris Fuchs, The American Society for Quality

If we had to sum up 2002 in one phrase it would be, "Volunteers take ASTD chapter to the next level." The SEWI Chapter had several key accomplishments that truly took our chapter to the next level.

#### Key Chapter Accomplishments:

1. Redesigned the Discovery newsletter
  - Transformed the look as well as the content with a total redesign and change to two-color, and improved the articles and features. Even more impressive, this significant improvement in quality and professionalism was all done while reducing costs.
2. Redesigned the Website
  - Transformed the look and navigation by going from a text-based, generic look to take full advantage of the visual aspects of the web medium. This allowed us to present the picture of ASTD that we want to present to the world – one of professionalism, diversity and activity.
3. Improved the ASTD EXPO
  - The year culminated with the 3<sup>rd</sup> Annual ASTD Expo where we combined talented, respected local speakers with nationally and internationally recognized speakers like Chris-Clarke Epstein and Donald Kirkpatrick. With effective planning and expanded marketing, the result was an event that compared to last year's Expo, drew *twice* as many people, and netted profits *six times* larger. Our chapter also gained 15 new members who joined ASTD that day.

Besides the overall accomplishments noted above, here are some other key measurements of our chapter's services:

- 99% of program participants felt welcome at programs
- 92% of program participants indicated "yes" that they had the opportunity to network
- 82% of participants rated program subjects as Excellent or Very Good
- 80% of participants rated program speakers as Excellent or Very Good
- 24% (70 members) of membership were "involved" in our chapter (Volunteerism Goal was 30%)
- Revenue generated was over \$6,000, which was added to chapter reserves (Revenue Goal was \$3,000)

To sum up all the measurements and all the comments heard throughout the year, the SEWI

Chapter of ASTD is a very open, active chapter that puts on quality programs, provides good networking opportunities, and is financially sound. We have taken the organization to the next level.

#### **2003**

President – Dorothy Johnson, T&D Consulting Group  
President Elect – Patti Ulwelling, Strong Fund  
Secretary – Kit Behling, The Training Kit  
Treasurer - John Krahn, Cousins Subs

The 2003 Board continued to work on the previous year's Strategic initiatives. One initiative was building our membership and getting members involved, which resulted in our developing a 30-second elevator speech designed to educate, engage people and create enthusiasm about ASTD. We engaged in a self-assessment of our behavioral styles and looked at how we might improve our personal effectiveness as board members. The Board was restructured to create more strategic efficiency. The first segment of our 2004 Strategic Plan was completed at the end of 2003. Two of the board members presented a highly successful workshop on how to successfully develop an Expo at the ASTD Leadership Conference in Alexandria, Virginia.

The *Discovery* team continued to do an exceptional job of producing an outstanding News Magazine. Our website was expanded and continued to be improved. A new GotoGuide was created on our website. A newly formed Involvement Committee created new ways to get our membership actively involved in our Chapter. The idea of an Organization Development Certificate was born and the structure was developed. The PPG's were redesigned and revived into Special Interests Groups. The Expo Committee did an outstanding job of selecting speakers, topics and vendors to make 2003 a tremendous financial success, which helped a great deal to meet our financial goals for 2003. The Programming Committee used innovative ideas for times, locations, topics and speakers for the Professional Development meetings/programs. We surveyed our membership to determine what they're interested in how they'd like to contribute and what they'd like to see in future Professional Development meetings. We continue to work toward building member participation and satisfaction while being fiscally responsible.

#### **2004**

Board of Directors



- The list of operational policies and procedures was expanded to provide more direction for leaders and members.
- The incoming Board attended the national ASTD Leaders Conference as part of their training process.
- The bylaws were revised to reflect modern communication practices and to streamline processes for member communication.
- In an effort to make the Board more visible and accessible to the membership, the chapter held two business meetings during the year in which members were invited to give input about the chapter.
- The Board was restructured so that Vice Presidents were nominated for specific responsibilities within their areas of talent and were given liaison duties with committees that had strong interdependencies.

## 2005

### Board of Directors

President – Patrice McGuire, McGuire Business Partners

President Elect – Debbie Gans, Medical College of Wisconsin

Past President – Patti Ulwelling, MGIC

Secretary – Treasurer – Terri Kowler, Automated Health System

Vice President of Membership – Larry Cockerel, Success Unlimited

Vice President of Professional Development – Marjorie Treu, North Shore Bank

Vice President of Communication – Bonnie Hemingway

Vice President of Member Services – Kathren Lamb, Froedtert Hospital

Vice President of Marketing – Laura Karpfinger-Clark, Thompson NetG

Chapter Administrator – Judy Hushka

The 2005 key initiative this year was to focus on member benefits. It was recognized that greater energy and resources needed to be directed to maintaining satisfied members, therefore looking at creative member benefits. Throughout the course of the year we focused on the following items:

- Created a new membership fee structure that resulted in an annual membership fee that included free attendance at the Professional Development Programs throughout the year.
- Developed additional technology strategies by enhancing our website with added features. For example, a discussion board, shopping cart, searchable directory and GoToGuide.

- Organized a sub-committee comprised of one representative from each committee. This group's purpose was to work together collaboratively to ensure committees were working together effectively on key initiatives and not duplicating efforts. The name of this committee is: The Joint Committee.
- Supported the organization by creating the image and branding campaign to attract potential members. We were able to identify who these members were and where our potential members would come from. In essence, we were able to profile our members.
- Continued the develop of content and prepared to launch our first OD Certificate Program.
- Monitored the satisfaction of the membership group by coordinating a membership survey.
- Additional Accomplishments: Identified and contracted with a new firm to serve in the role as our chapter administrator. We contracted with Karen Hendrickson of Hendrickson and Associates.

## 2006

### Board of Directors

President – Debbie Gans, Medical College of Wisconsin

President Elect – Marjorie Treu, North Shore Bank

Past President – Patrice McGuire, McGuire Business Partners

Secretary/Treasurer – Terri Kowler, Automated Health System

Vice President Communication – Bonnie Hemingway, Miller Brewing Company

Vice President Marketing – Laura Karpfinger-Clark, Thompson/netG

Vice President Member Services – Kathren Lamb, Froedtert Hospital

Vice President Membership – Karen Schroeder, U.S. Bowling Congress & Patti Ulwelling, Mortgage Guaranty Insurance Corporation (MGIC)

Vice President Professional Development – Lori Glander, Learning Leverage

Chapter Administrator – Karen Hendrickson

The 2006 key initiative was to focus on increasing membership and membership involvement.

- Launched our first OD Certificate Program in Spring and offered the program again in Fall.
- Offered quarterly new member orientation.
- Implemented a membership call-a-thon to contact every chapter member and asked if they were receiving the electronic communication, whether they were aware of

the member benefits and to personally invite them to be active in the Chapter.

- Created a brochure for corporate sponsorship and member recruitment.
- Dissolved Vice President Marketing role and added Vice President of Specials Events to oversee Knowledge Summit and other special events planned during the year.

## 2007

### Board of Directors

President – Marjorie Treu, Team Fusion

President Elect – Karen Schroeder, Davis & Kuelthau, S.C.

Past President – Debbie Gans, Medical College of Wisconsin

Secretary – Treasurer – Terri Kowler, Automated Health System

Vice President of Membership – Janine Smith, The Bartlett Group

Vice President of Professional Development – Lori Glander, Learning Leverage LLC

Vice President of Communication– Bonnie Hemingway, Miller Brewing Company

Vice President of Member Services – Kathren Lamb, Froedtert Hospital

Vice President of Special Events – Janine Smith & Karen Schroeder

Chapter Administrator – Karen Hendrickson

The strategic focus during 2007 focused on:

Membership – to have a large active membership;

Member Services – to enhance member benefits by offering an array of services;

Revenue/Sponsorship – to remain financially secure; Succession Planning – to identify organizational leaders at the Board level.

Specific strategies in each of these areas include:

### Membership

- Increase membership 5% annual with target of 287 members. Achieved: 267
- Increase active member involvement to 25%. Achieved: 28%

### Member Services

- Create committee assessment of each committee's website needs. Achieved: Assessment created through the Joint Committee and needs collected for use in 2008 Strategic Planning Meeting.
- Enhanced Member Only Discussion Board capability.
- Offer 1-3 new benefits for members. Achieved: Organizational Development SIG, Performance Improvement SIG, and SEWI Book Club.

### Revenue/Sponsorship

- Maintain \$30,000 in reserves. Achieved: \$30,000
- Increase operating budget by \$5,000 for 2008 initiatives. Achieved: \$2,000 from Spring Legend Series with Bob Pike. \$2,000 from Fall Knowledge Summit with Afterburner Fighter Pilots as Keynote.
- Generate two additional revenue streams. Not achieved.
- Gain new corporate sponsorships to cover all chapter events. Achieved: Book giveaway sponsor for monthly Programming (Team Fusion).

### Succession Planning

- Increase Board visibility at professional development events. Achieved: Average 25% Board presence at monthly programs, Spring Legend Series, and Knowledge Summit.
- Mentor 10 potential leaders. Achieved: 5 at Board level; 2 at Committee Chair level.
- Implement a leadership development plan. Achieved: Created new on-boarding orientation and training of incoming leaders.
- Develop transition information for successors. Achieved: Revision of Policies & Procedures Manual; documented committee processes.

## 2008

### Board of Directors

President – Karen Schroeder, Davis & Kuelthau, s.c.

President Elect – Rochelle Behling, Kohls Department Stores

Past President – Marjorie Treu, Team Fusion

Secretary – Treasurer – Andy Waldoch, C & H Distributors, LLC

Vice President of Membership – Janine Smith, The Bartlett Group

Vice President of Professional Development – Susan Kerr, Aurora Health Care

Vice President of Communication– Warren Metzger, Ken Cook Co.

Vice President of Member Services – Jill Busch, API Software, Inc.

Vice President of Special Events – Julie Jordan, U.S. Bank Wealth Management

The strategic focus during 2008:

**Membership** – to have a large active membership

**Member Services** – to enhance member benefits by offering an array of services

**Revenue/Sponsorship** – to remain financially secure

**Succession Planning** – to identify organizational leaders at the Board level

Specific strategies in each of these areas include:

### **Communications**

- Published 5 Discovery issues. Oct-Dec issue was first quarterly issue for Discovery.
- Published SEWI-Blast at least once for every program and event.
- Added columnist.
- Published review for every program and event.

### **Executive Committee**

- Researched and hired new administrative team to reduce administrative expenses.
- Marketed programs to non-members by Email messages, chapter leader group, other local chapters and national ASTD.
- Discovery articles included board meetings/action items and financials to update members about the chapter.
- Consistent review and revisions to website to keep everything updated and accurate.
- Discussed partnership and confirmed sponsorship opportunities with several organizations.
- Promoted Chapter Incentive program (ChIPs) to current members through Discovery, website and Orientation.
- Sponsored July Social Event and Call-a-thon to help recruit volunteers.
- Provided resources for recruiting and retaining volunteers to board members (i.e. handout, discussion board).
- Held January 2008 Volunteer Recognition Dinner.
- Provided on-board, orientation, and mentoring for Presidency-track and Secretary/Treasurer positions.

### **Membership**

- Student membership policy developed and approved.
- Created expectations for SIG members and invitation them to join SEWI-ASTD.
- Sent Welcome, Thank you and Please Renew e-mail to all members.
- Conducted Member orientations, made phone calls and posted information on the website.
- Attended monthly programs to encourage involvement.

### **Member Services**

- Hosting/maintaining website, administration, and member database transferred to new headquarters.
- Created global search engine.

### **OD Certificate**

- Obtained board approval for HRCI and submitted form.
- Spoke to several interested organizations. Finalizing partner in 2009.
- Obtained new instructor for Module 2.
- Created coordination checklist and outline of marketing plan.
- Set dates for 2009.

### **Programming**

- Marketing efforts through the Small Business Times and new calendar on website.
- Providing discount membership for students.
- Provided an OD program to help promote the OD Certificate program.
- Obtained sponsorship to cover the cost of monthly programs.
- Board members helped coordinate programs in 2008.
- Board agreed to manage the registration at monthly programs.

### **Special Events**

- Venue, speakers, sponsorship completed for March 2009 Special Event.
- Held Spring 2008 Special Event at Kohl's which offered members an additional event to attend.