

**CLC (Chapter Leadership Council) Meeting**  
**Virtual Meeting held March 2, 2021 at 3:15 CST**

**Breakout Room 1** Jennifer Eby, Ellen Coen, Steve Tennessen, Steve Alford, Steve Cooper, Zach Devillers with the following chapters: Pacific Northwest, Indiana-Kentucky, Southern California, Metro New York, Chesapeake and Chicagoland-Wisconsin

1. Membership Activities
  - a. Happy Hour
  - b. "Coffee is for Closers" – series of morning meetings for Chicagoland-Wisconsin
  - c. LinkedIn – reviewing past member lists and reaching out to them on LinkedIn to join again
  - d. LinkedIn – posting regularly from chapter page or creating chapter page to keep active with events
  - e. Sponsoring robotics teams with local schools
  - f. Virtual Meetings – various speakers including Steve Turner at chapters (he was at conference too)
  - g. Working with Charities and foodbanks
  - h. Golf and hopeful EDS to come back for 2021
2. Events that didn't work
  - a. In person
  - b. Golf, baseball etc because of covid
  - c. Shows cancelled
  - d. Various summer events
3. Successful Events
  - a. Chicagoland-Wisconsin upgraded zoom account to allow for live polling in monthly meetings
  - b. Golf was successful in some territories
  - c. Steve Turner great speaker – 70 people turn out for NY chapter
4. Events with Distributors, Manufacturers or Customers
  - a. Inviting all to virtual meetings
  - b. Small business start up
  - c. Distributor panelists
5. Chapter Challenges
  - a. Event Coordinators for events
  - b. Keeping LinkedIn active

**Breakout Room 2** Bob Gassman, Bob Evans, Pat Duggan, James Patterson, John Latimer with the following chapters: Chicagoland-Wisconsin, Ohio, Northern California, Pacific Northwest

1. Chapter Challengers
  - a. Recruiting members and membership drives
2. Chapter Activities

- a. Golf is strong activity in many chapters
- b. Educational program with various speakers and panelists
- c. Sponsoring robotics teams for college/high school in territory
- d. Opening virtual events up to other chapters has been a great perk
- e. John Simari is great speaker at chapter events
- f. Sponsoring programs with local distribution
- g. Some chapters charge small non member fee for events

**Breakout Room 3** Larry Flores of Northern California and other members of group unnoted

- 1. Membership
  - a. Make grants available to members attracted, new members etc.
  - b. Discounted/no cost
  - c. DTAM Reports Free for members
  - d. Officers Represented by Rep/Dist/MFG
- 2. What didn't work in your chapter?
  - a. Tried in person events with reduced capacity
  - b. Reached out to sponsors
  - c. Many members went quiet
- 3. Returned to Normalcy
  - a. Late summer held outdoor events
- 4. Virtual Events
  - a. Adding chapters outside of territory nice practice
  - b. Water Cooler events productive
- 5. Effective Events
  - a. Being consistent helps.
  - b. Set schedule for whole year
  - c. Virtual component with in person

**Breakout Room 4** Matt Cohen, Gary Smith, Joe Braun, King Coombs, Terri Straube, Tod Ege of the following chapters: Northern California, Chicagoland-Wisconsin, Michigan and Pacific Northwest.

- 1. Member Activities
  - a. Michigan noted Water Coolers for 30 minutes
    - i. Tour of rep firms with customer of high end audio show room
    - ii. Work with regionals – best practices
  - b. Southern Cal meets every month
    - i. Breakfast and lunch meetings – virtual
    - ii. Presenters include engineers
    - iii. Golf tournaments
    - iv. Panel presentations
    - v. Web design and branding
    - vi. Benefits memo
    - vii. Presentation of National ERA website
    - viii. Social hours
    - ix. Local economist on call

- c. Pacific Northwest
  - i. Working on getting ideas and becoming more active
- d. Chicagoland-Wisconsin
  - i. Monthly breakfast meeting called “Coffee is for Closers” series - Effective way to meet regularly
  - ii. Recently worked on membership drive by contacting potential members and past members
- e. All chapters noted distributor and manufacturer members

**Breakout Room 5** Rick LaPiana, Jeff Huntsinger, Byron Holloway, Jim Gleason, Doug Bowers, Dave Fitzgerald from the following chapters: Chicagoland-Wisconsin, Southwest, Empire, St. Louis and Pacific Northwest

1. Successful events
  - a. Regional DTAM
  - b. Golf Outings
  - c. Mixers at pubs
  - d. Speaker events with topics around
    - i. Supply chain
    - ii. Global Design
    - iii. Distributor Initiatives
    - iv. Millennial Engineers
    - v. Chamber of Commerce
    - vi. Cyber Security
  - e. Meetings at rep firm offices well attended
2. Ideas to support local robotics teams at schools
3. Challenges
  - a. Board participation
  - b. Attendance – getting more than just board to show up
  - c. ERA members not participating
  - d. Distributor participation
  - e. Membership expansion – finding new rep firms

**Breakout Room 6** Lori Bruno, Walter Tobin, Diana Nawrocki, Cary Klingner, Pater Conlan of the following chapters: Midlantic, ERA National, Chicagoland-Wisconsin, Minnesota and Northern California

1. Major Chapter Challenges and Solutions
  - a. Chapter attendance at functions. One chapter sent out a survey to all members and only received 13 responses. Results were “underwhelming”.
  - b. Creating relevant chapter events. Solutions included piggybacking off Water Cooler sessions and breakout sessions from past National ERA Conferences.
2. Most Effective Events
  - a. Events with known speakers (Sam Richter, Budde Marketing, Walter Tobin).
  - b. Bringing in National Resources to discuss “white papers” (NorCal has an event coming up in April that will be an all-chapter event).
  - c. Coffee Talks – Virtual or in person once we are out of the Pandemic. Invite as many people as possible, both members and non-members.

- d. Any event (like a Holiday Party) where you attach a charity to the event (Meals on Wheels, Homeless Shelters).
- 3. Events involving Distributors, Manufacturers or Customers
  - a. Baseball games.
  - b. Horse races.
  - c. Dinners where a speaker is brought in.
- 4. Events that did NOT work
  - a. Golf tournaments didn't seem to work in Minnesota. Several distributors showed up but only a few reps.
  - b. Bocce Ball – Reps only showed up, no real value to the event.