

CoreNet Global Chapter Learning Community

The Role of the Chapter Learning Community

The Chapter Learning Community exists to share and capture best practices, to explore opportunities and increase continuity and understanding within chapter boards as it relates to improving the delivery of chapter learning programs.

The Role of the Chapter Learning Advisory Committee and Staff

The Chapter Learning Advisory Committee and staff will facilitate opportunities for this Community to convene. The role of the Chapter Learning Advisory Committee is to moderate Community meetings and to help capture ideas that may be useful in global practices. The role of staff is limited to capturing and disseminating information to the Community, as well as answering and directing specific program-related questions.

April 18, 2007 Meeting Summary

Attendees:

Michael Benham, Michigan Chapter

Evelyn Morris, Atlanta Chapter

Barbara Donaldson, Northern California Chapter

Dan Wright, Mid-Atlantic Chapter

Amanda Brooks, Director Summit Education Programs, CoreNet Global

Bill Threlkeld, Tennessee Chapter

Suzanne Heidelberger, NYC Chapter, Chapter Learning Advisory Committee Chair (Moderator)

Brian Hayes, Chicago Chapter

Kelly Benedict, Chicago Chapter

Philip Grossberg, Carolinas Chapter

Steve Johnson, Rocky Mountain Chapter

Mirela Gabrouska, Chicago Chapter

Karen Murphy, Director Chapter Program Development, CoreNet Global

Suzanne (Moderator): What would you like to gain from this Community?

Michael: Survey hit the nail on the head regarding tactical level stuff Michigan really need.

Steve: Rocky Mtn chapter is on toddler level looking for ways to build programs.

Kelly: Chicago Chapter is in our infancy as far as learning programs are concerned. Just launching our educational program. Looking for lessons learned from others.

Barbara: N. California Chapter would like to discuss questions/challenges for leveraging our partnership.

Bill: Atlanta Chapter provided us great support by sending 3 business people to our chapter, so leveraging off each other is a big help.

Suzanne: Chapter spotlight each month could feature chapters at various stages of development. Moving on to next topic – how do you fund your learning programs?

Evelyn: Atlanta holds 1 fund drive a year and get money to sponsor all programs (learning and networking) a year, then allocate from the budget money for different programs. Not on an

individual basis. We've found it much easier. Sponsors get names on website and at every event. Our model is now 1 event per month – either learning or networking - and 1 full-day educational forum. CoRE Curriculum chapter partners. So, this year 3 chapter/edu meetings and 1 day forum plus the Atlanta Summit in the Fall. Everyone felt too busy to do 1 edu event plus 1 networking event a month, so cut it back to 1 a month and now seeing better attendance at events. 70-100 people at edu events and networking events about 100 in attendance. Always have breakfast or lunch at event and attendee fee goes to pay for venue and food. Have gotten a lot of new members this year and they are impressed with our programs.

Michael: This year, Michigan went for specific sponsorship program for edu series. 2 large companies sponsor the events. They get free attendance at all events for members of their companies. It funds about one-third cost of the programs. Sponsorship fee \$2,500 and \$1,500.

Barbara: Right now, N. Cal sponsoring meeting by meeting, but moving toward an edu. sponsorship model.

Brian: Chicago adopted the Atlanta Chapter sponsorship model this year. It's much cleaner.

Evelyn: One fund drive per year is a lot less hassle. Less going back to harass the sponsors over and over again.

Suzanne: This also helps with the luxury of having an annual budget. NYC Chapter does this annually also. Our model is smaller workshops free to members with no non-members. Then hold larger events that are networking and learning open to everyone, but price distinction between members and non-members. \$25,000 learning sponsor this year. For this one sponsorship they have specific programs open only to them as the service provider with sr. end users attending also.

Next topic is what was your most successful educational event and why.

Philip: Carolinas chapter held a roundtable event. We're still in our infancy in terms of getting constituents from a very geographically dispersed area. Our membership is about 130. This event geared more toward senior folks in the membership. We split it down the middle in terms of EU/SP. Don't feel that the distinction between the two groups is needed. Limited to 20 seats. All day event. 2 topics plus lunch. We created the event and hired professional moderators to keep things moving. Hard to fill the room and generate excitement for this first one, but the people who attended want to come back for more. Started a little later in the morning and ended a little earlier in the afternoon to allow for commuting. We discussed what's the best formula for a RE dept? What's the best model? And the Portfolio – the internal and external strains and influences to the portfolio. No panel – we felt we had the expertise we needed within the chapter. The invite specified that we were looking for senior people. We'll have other events for the up and comers. The Board selected the topics and we held several meetings with the moderators to update and keep them going. It was a member only event. Charged \$110 per person. The Facility was donated by Bank of America. It wasn't a make money proposition, just wanted to break even. This was something I thought about from a Corp. Executive Board event. We geared dialogue and advertisement to say you really shouldn't come to this if you're not a sr. person. Small enough to have a good dialogue and participation.

Steve: Rocky Mountain Chapter is trying to get a regular CRE event throughout the year. We haven't been getting as good a turnout from the CREs at chapter events as we'd like. We're trying to liven up the CRE community with these events. 4 programs through the course of the year, plus 4 roundtables. Trying to foster interest from our CREs.

Philip: Wanted to get away from dividing SP/EU by raising it to an academic level.

Suzanne: Next topic – Any new things you are currently using in addition to the roundtables?

Steve: Instead of an educational event at the end of the year, Rocky Mountain held an improvisational comedy event – a fun event instead of a heavy edu event. The membership really enjoyed it.

Michael: Michigan held panel discussions coupled with a CoreNet Global speaker. Generates interest with local names. Held a luncheon with speaker Chris Chung on tax incentives coupled with local experts. Chris spoke for 45 minutes and panelists each about 15 minutes. Held a half day event with speaker Scott Silver on Negotiating Operating Expense Clauses. He gave his standard presentation and invited commentary from panelists. Panelists are warned ahead of time what the discussion will be and the topics to be discussed. Both very well received.

Evelyn: Atlanta has done this too. Coupled a CNG speaker with local cohorts. Local members are interested in what their local cohorts are doing.

Suzanne: Moving on to Q&A

Mirela: Maybe we can proactively help each other by discussing what's in the future rather than discussing the past. Let's hear about what's being planned and everyone put in their 2 cents.

Suzanne: This along with a chapter spotlight and each person comes with their proposed program and they talk about it.

Kelly: I'd like to know what resources are needed for a good educational committee? What does it take to be successful?

Evelyn: Atlanta Edu Committee meets once a month. 12 people on it – all different types. This model has been in place for a long time.

Suzanne: NYC chapter is very similar to this. Regular monthly meetings. Only way to get traction. We also have a checklist of what needs to get done and when.

Evelyn: Each member of the committee will take ownership of a program at some point. That's what they want from the experience.

Suzanne: The Committee becomes its own Community. Thoughts about next meeting?

Consensus: Pick 2 chapters to present and hold a 20-minute "help" session.