CONNECTIONS | CAREERS | COMMUNITY

EWI of MILWAUKEE

Business and Membership Meeting

September 7, 2021

MISSION STATEMENT

Executive Women International brings together key individuals from diverse businesses for the purposes of:

- Promoting member firms
- Enhancing personal and professional development
- Encouraging community involvement

VISION STATEMENT

To enhance professional growth and development within a diverse group of women while empowering them to make a difference as they inspire others.

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CONNECTIONS | CAREERS | COMMUNITY

FORM 18
EWI OF MILWAUKEE Board of Directors
March 2, 2021 BUSINESS MEETING MINUTES
Virtual via Zoom

CALL TO ORDER: 6:51 PM

ANNUAL BUSINESS MEETING MINUTES

Approval of September 2020 Business Meeting Minutes

Any corrections? _____YES __X___NO

Motion to approve September 2020 Business Meeting Minutes as presented.
Motion made by: Lora Burback Seconded by: Julie Frey
Motion passed: ___X____YES _____NO

Presentation of Business Reports through January 2021.

Rachel Adas, Chair, presented proposed 2021/2022 Nomination Committee (in addition to Marjorie Yoshida): Tina Braley, Donna Munnik, Jennifer DeLaura and Rachel Adas.

Motion to approve 2021/2022 Nomination Committee.
Motion made by: Rachel Adas Seconded by: Cindy Kunze
Motion passed: ___X___YES _____NO

Motion to close March 2021 Business Meeting
Motion made by: Donna Munnik Seconded by: Marjorie Yoshida
Motion passed: ___X___YES _____NO

ADJOURNMENT
There being no further business, the meeting adjourned at 7:20 PM.

Officer and Advisor Reports

TREASURER'S REPORT

Balances as of 7/31/2021		
Associated Bank Operating	$ 10,163.95	
Edward Jones (Operating)	$ 27,158.73	
Paypal	$ 2,388.66	
Total General Accounts	$ 39,711.34	
Associated Bank BCDP		$ 6,317.13
Edward Jones (BCDP liquid account)		$ 15,824.53
Edward Jones (Education Investment Account)		$ 48,910.48
Total Education Accounts		$ 71,052.14
Total ALL MKE EWI Chapter Accounts		$110,763.48

What a year it has been! The COVID-19 rollercoaster continued to impact our EWI Milwaukee chapter. We met virtually for most of the year, keeping the pay-as-you-may fee model, eased into a hybrid model, and returned to full in-person meetings in August. It's so nice to be back in person and connect with all the ladies. The books have been impacted by our decision to hold meetings virtually, but others have benefitted such as our operations and philanthropic efforts.

- Over the past couple of years, we have built up funds in our operating checking account, allowing us to maintain a reserve of cash for emergency needs. We have been operating within our budget and within our means and we plan to do the same in the upcoming year.
- This year we moved our investment accounts from Ameriprise to Edward Jones. We are lucky to have Missy Whalen taking great care of our investments. Missy has helped us structure our accounts to ensure that we make the most on returns while still having a liquid account if we ran into an emergency. $12,000 is budgeted each year for our scholarships and literacy awards. We only transferred $6,000 from our investment accounts to cover these expenses because of increased BCDP contributions and a returned scholarship check. Please see our balances listed above.
- In July the Investment Committee met to go over the investments held at Edward Jones. Missy Whalen talked in-depth about the strategy she is using while managing our accounts. The committee is comprised of Brian Lewis (Edward Jones) and Paul Baldino (Lake Financial Group). The committee agreed that our financial strategy and trajectory is in the direction that is suitable for the needs of EWI Milwaukee.
- The meeting notice includes the Budget Committee's proposed budget for 2021-2022, which will be reviewed, discussed, and voted in at the business meeting. Please review the notes accompanying the budget and bring any questions to the business meeting.
- Thanks to everyone for your willingness to donate money, your time, and your vast array of knowledge and skills! You are the ones making everything work. Here's to hoping we can be back together again for every meeting!

EWI of Milwaukee
Budget vs. Actuals: FY 2020-2021 - FY21 P&L

	Jul 2021	Total		
	Actual	Actual	Budget	Remaining
Income				
300 Membership Income		0.00	0.00	0.00
301 New Member - Chapter		0.00	0.00	0.00
301a New Member - Chapter		385.00	550.00	165.00
301c New Rep - Admin Chapter		65.00	100.00	35.00
Total 301 New Member - Chapter	**$ -**	**$ 450.00**	**$ 650.00**	**$ 200.00**
303 Renewal Member - Chapter		0.00	0.00	0.00
303a Renew 1st Rep - Chapter		1,875.00	2,750.00	875.00
303b Renew 2nd/3rd - Chapter	50.00	160.00	200.00	40.00
303c Renew Sustaining - Chapter		0.00	25.00	25.00
Total 303 Renewal Member - Chapter	**$ 50.00**	**$ 2,035.00**	**$ 2,975.00**	**$ 940.00**
Total 300 Membership Income	**$ 50.00**	**$ 2,485.00**	**$ 3,625.00**	**$ 1,140.00**
320 Meeting Income		0.00	0.00	0.00
320 BCDP Mtg Income		0.00	2,400.00	2,400.00
320 Chapter Meetings	400.00	2,715.22	9,600.00	6,884.78
320 Firm Recognition Night		0.00	4,500.00	4,500.00
Total 320 Meeting Income	**$ 400.00**	**$ 2,715.22**	**$ 16,500.00**	**$ 13,784.78**
350 Operating Fund Projects		3,844.65	3,380.00	(464.65)
350 Raffles		893.55	0.00	(893.55)
Total 350 Operating Fund Projects	**$ -**	**$ 4,738.20**	**$ 3,380.00**	**$ (1,358.20)**
355 Miscellaneous Income		623.00	580.00	(43.00)
360 BCDP Income		1,905.00	1,000.00	(905.00)
360 Education Fundraiser		1,252.03	1,500.00	247.97
Total 360 BCDP Income	**$ -**	**$ 3,157.03**	**$ 2,500.00**	**$ (657.03)**
Unapplied Cash Payment Income		515.00	0.00	(515.00)
Total Income	**$ 450.00**	**$ 14,233.45**	**$ 26,585.00**	**$ 12,351.55**
Gross Profit	**$ 450.00**	**$ 14,233.45**	**$ 26,585.00**	**$ 12,351.55**
Expenses				
400 Annual Renew		770.00	935.00	165.00
403 Meetings & Conventions		0.00	0.00	0.00
403 Board Forum		0.00	0.00	0.00
Board Forum Registratio		0.00	125.00	125.00
Total 403 Board Forum	**$ -**	**$ -**	**$ 125.00**	**$ 125.00**
403 LCAM		0.00	0.00	0.00
LCAM Delegate Fee		100.00	100.00	0.00
LCAM Registration	650.00	1,950.00	1,950.00	0.00
LCAM Transportion	450.41	1,423.21	900.00	(523.21)
Total 403 LCAM	**$ 1,100.41**	**$ 4,023.21**	**$ 2,950.00**	**$ (1,073.21)**
403 Leadership Caucus		0.00	0.00	0.00
Leadership Caucus Registration		300.00	390.00	90.00
Total 403 Leadership Caucus	**$ -**	**$ -**	**$ 390.00**	**$ 390.00**

Total 403 Meetings & Conventions	**$ 1,100.41**	**$ 4,023.21**	**$ 3,465.00**	**$ (558.21)**
406 Misc		175.08	400.00	224.92
406 Bank fees	4.95	83.27	0.00	(83.27)
406 Constant Contact		378.00	400.00	22.00
406 Liability Ins		0.00	650.00	650.00
406 Membership/Nametags		349.10	200.00	(149.10)
406 Past President's Gifts		303.91	450.00	146.09
406 Philanthropic Programs	56.40	983.94	0.00	(983.94)
406 Presidents Expense		216.05	250.00	33.95
406 Records Storage		19.99	50.00	30.01
406 Sponsorships/Branding		250.00	700.00	450.00
406 Website		425.28	225.00	(200.28)
Total 406 Misc	**$ 61.35**	**$ 2,934.62**	**$ 3,325.00**	**$ 390.38**
420 Meeting		0.00	0.00	0.00
420 BCDP Meeting Exp		0.00	2,880.00	2,880.00
420 Chapter Meeting Exp	992.55	2,632.97	8,960.00	6,327.03
420 Firm Recognition Night		260.18	4,650.00	4,389.82
420 Speakers (meals/honorarium)		275.00	500.00	225.00
Total 420 Meeting	**$ 992.55**	**$ 3,168.15**	**$ 16,990.00**	**$ 13,821.85**
450 Operations Fundraising		88.45	0.00	(88.45)
450 Fundraiser	1,106.25	1,231.05	0.00	(1,231.05)
450 Raffles		174.70	0.00	(174.70)
Total 450 Operations Fundraising	**$ 1,106.25**	**$ 1,494.20**	**$ -**	**$ (1,494.20)**
460 BCDP Education Expenses		0.00	0.00	0.00
460 Scholarship Program Exp		0.00	750.00	750.00
Total 460 BCDP Education Expenses	**$ -**	**$ -**	**$ 750.00**	**$ 750.00**
Total Expenses	**$ 3,260.56**	**$ 12,390.18**	**$ 25,465.00**	**$ 13,074.82**
Net Operating Income	**$ (2,810.56)**	**$ 1,843.27**	**$ 1,120.00**	**$ (723.27)**
Other Income				
800 Interest Ameriprise Acct		5,015.96	0.00	(5,015.96)
801 Gain/Loss on Investments	2,125.58	3,525.17	0.00	(3,525.17)
Total Other Income	**$ 2,125.58**	**$ 8,541.13**	**$ -**	**$ (8,541.13)**
Other Expenses				
460 Scholarship Donations	12,000.00	12,000.00	12,000.00	0.00
Total Other Expenses	**$ 12,000.00**	**$ 12,000.00**	**$ 12,000.00**	**$ -**
Net Other Income	**$ (9,874.42)**	**$ (3,458.87)**	**$ (12,000.00)**	**$ (8,541.13)**
Net Income	**$ (12,684.98)**	**$ (1,615.60)**	**$ (10,880.00)**	**$ (9,264.40)**

Respectfully submitted,

Anna Lucius, EWI Milwaukee Treasurer

Committee: TrenLan Pounds, President; Marjorie Yoshida, Vice President/President Elect; Rachel Adas, Board Advisor; Donna Munnik, Past Treasurer; Kathy Marchant, Past Treasurer

PRESIDENT ELECT

As President-Elect I have a variety of responsibilities within the Chapter.

Transfer of Treasurer duties and responsibilities

Continue to work closely with current treasurer, Anna Lucius. Will train and work with incoming Treasurer.

New Member Orientation

New firm representatives are personally welcomed with an orientation that introduces new representatives to chapter processes for meeting registrations, chapter guidelines, EWI lingo, as well as an overview of how our committees are utilized and where she may be interested in getting involved. Orientations completed this year: Riley St. Claire, Missy Wahlen, Julie Asher.

Monthly Meeting Surveys

A survey is sent after each of our monthly meetings for membership to provide feedback on our meeting content and other chapter matters; answers are confidential and greatly appreciated by the board. Please complete the surveys regardless of your meeting attendance. Only one survey question is about the meeting, the rest are questions that provide the board information to move forward with planning. Results are discussed each month at the Board Meeting following the monthly meeting.

Social Event Planning

In addition to our monthly membership meetings, we organize socials to get to know each other outside of membership meetings. We had a virtual holiday social in December and a fall walk on the Hank Aaron Trail in late October. We had a hybrid social at Onesto (thanks Nicki Rouleau) in March and a completely in-person social in July at the City Lights Brewery! It was so nice to see each other and sit, drink, eat and talk in the sun. What a beautiful day!

2021-2022

I formed our Board of Directors for the 2021-2022 fiscal year. It was announced at the August meeting and will be voted on at the September meeting. October installation will take place at the MMAC with Corry Joe Biddle of the MMAC as our guest speaker. Board Retreat is planned for Saturday, September 11.

Respectfully Submitted,

Marjorie Yoshida, President Elect

BOARD ADVISOR

As the Board Advisor, it is my responsibility to work with and advise President Pounds and the Board of Directors as needed. Other duties as Board Advisor include:

FIRM RECOGNITION NIGHT
As Chair of the FRN Committee, I will work with the committee members to coordinate our special evening. We will celebrate and acknowledge our member firms while highlighting our accomplishments for this past year. Mark November 2 on your calendar, as well as your executive and colleagues' calendars, for our annual Firm Recognition Night. You will not want to miss this incredible event as we put you and your firm in the spotlight!

PAST PRESIDENTS' COUNCIL
As Chair of the PPC, I facilitated a meeting in late Spring to receive feedback on pertinent business and suggestions from the chapter.

NOMINATING COMMITTEE
As Chair of the Nominating Committee, alongside Jennifer DeLaura, Donna Munnik and Tina Braley, we assisted and advised President-Elect Yoshida as she established a Slate of Officers and Directors for her upcoming board.

EXECUTIVE ADVISORY COUNCIL
The Executive Advisory Council has been established to provide feedback and assistance in achieving and expanding our Chapter's strategic plan goals. We are currently reviewing upcoming needs and ways to engage our advisory committee in FRN and Executive Communications. My role is to facilitate meetings and communication as needed between our advisory council members and board members. Council members include Ginny Finn – YWCA Southeast Wisconsin and Barb Smith – MMAC.

Respectfully submitted,

Rachel Adas, Board Advisor

Committee Reports

HOSPITALITY / CARING

Responsibilities:

- Creating and sending monthly meeting notices to membership; coordinating registration information with the program committee; assembling name badges and ribbons; creating registration check-in forms and taking attendance at the meetings; collecting and reconciling meeting fees with the Chapter Treasurer; compiling the attendance report for review at monthly board meetings; updating membership lists in Constant Contact; maintaining the master attendance list; ordering new badges and ribbons as needed.
- Welcoming and introducing new members and guests to the membership during networking, as well as making sure no one is wandering about, not knowing where to go, etc.
- Recognizing life events such as birthdays, illnesses, deaths in the family, etc.; support of membership in times of such events; staying connected with our members by sending them handwritten birthday greetings, as well as appropriate cards for other life events.

As with 2020, this year we continued to meet virtually in the interest of everyone's safety. As Covid-19 restrictions started to lift, we had our first hybrid meeting of 2021 in May, which was our EWISP scholarship night. We still masked and social distanced, but members were definitely excited to finally see everyone (even if it was just from the nose up). Meetings continued to be hybrid through July and we even started to incorporate meals (albeit boxed dinners) back into our meetings.

Even though we're a smaller group now, meeting attendance has remained relatively consistent over the past few months. May's EWISP program saw the most attendees at 28 (that number includes guests). Average member attendance for the past 6 months (Feb-July) is 23. That's just down 2 points from the previous 6 months' average.

During the months that we weren't meeting in-person, members were given the option to donate to Caring & Sharing through my personal Venmo account. Once we started meeting in-person, contributions went back to the traditional method of donating money onsite. There are still funds available to use for members in need or to recognize significant member life events. Our current balance is $203.69. At present time, I have taken over the duties of sending handwritten greetings and acknowledgments of life events from Ellen who is focusing on her health. This duty will likely be shifted to the next Hospitality Director or assigned to one of hospitality's committee members.

This was my first year on the board, and it was definitely a memorable and fulfilling experience. For the first time, I felt very connected to what was going on within the group. TrenLan has shown tremendous leadership, and the board really worked hard to put together worthwhile programs, despite the ongoing pandemic. Serving as the Hospitality Director, I was finally able to memorize everyone's names. I thoroughly enjoyed crafting fun invites, and I will miss letting my creative side get a little crazy. I know that my committee didn't get to serve as much in the capacity they had become accustomed to before Covid-19. I do so appreciate their willingness to help when I did have tasks for them to tackle.

Respectfully Submitted,

Laura Poll, Hospitality Director

Committee: Anna Lucius, Barb Benish, Ellen Aumann, Ginny Czarnecki, Jennifer DeLaura, Julie Frey, Lora Burback, Lorie Barbian, Margie Gehrman, Mary Caye Smith, Rachel Adas, Sharon Fryjoff

PROGRAM

April: This was our last fully virtual meeting. Guest speaker, Claire Becker taught us about change and transition. We were left with quite a few takeaways from this speaker and would have her back in the future.

May: EWISP was a great turnout. Held at StoryHill Firehouse, we were able to use our credit with them from 2020. 2 of our awardees attended in person and 1 virtually. We were still not offering meals at this time.

June: our speaker, Jamar Jones was fantastic. We did offer boxed dinner options at this meeting from Tall Guy and a Grill. We were hybrid at the Rotary Building in Frame Park.

July: This was our literacy month with NextDoor. It's always great to hear from them and to learn ways to grow our partnership. This meeting was held at Bottlehouse 42 and was still a hybrid option for members.

August: with 2020 and 2021 being pandemic years, we held our annual heartfelt & handmade fundraiser at the Bavarian Bierhaus. This was our first in-person only meeting since 2020 and we did go back to offering the meal.

Insights:

- Members seem to enjoy the shorter meeting format, but it will affect the meal schedule.
- As we have fewer attendees to our meetings, it will be harder to find spaces to work within our budget (we averaged less than 20 people per meeting in the second and third quarter). We could focus on member firms as locations, but it is something we need to consider.

Respectfully Submitted,
Nickie Rouleau, Program Director
Committee: Rachel Adas, Riley St. Claire, Lorie Barbian, Lori Skerencak, Ginny Czarnecki, Nicki Parato, Laura Poll

COMMUNICATIONS

The Communications Committee serves as the primary source of disseminating information for the chapter. This is done through a variety of channels including email, social media, The Connect monthly newsletter and the chapter website.

Areas of focus for the Communications Committee for the 2020 – 2021 year include:

- Increasing followers and engagement on chapter Facebook, Instagram, and LinkedIn Pages
- Encouraging members to share firm news on a more regular basis
- Construction and publishing of new EWI website
- Member engagement in monthly social media posts

The Chapter Connect continues to deliver meeting news and updates. Recaps are available with links to our FB page and any accompanying handouts. We also highlight philanthropy initiatives and event participation. The newsletter is constantly evolving to ensure we provide relevant and useful information to our chapter members. We hope to begin planning for a Firm focused quarterly newsletter in the upcoming future.

We successfully launched our new website platform. This website layout is heavily focused on providing ample information and resources for recruitment purposes. TrenLan Pounds led a demo on how to maneuver the site as well as shared resources available for members through the Corporate, MyEWI Community.

Respectfully Submitted,
Cynthia Ortega, Communications Director
Committee: TrenLan Pounds, Laura Poll & Tricia Smith

PHILANTHROPY

The Philanthropy Committee focused this year's activities on four components, the EWISP scholarship program for high school seniors, the Next Door Literacy Program, vetting of our 2022 Community Partner and organizing Community Engagement opportunities for our members. Subcommittees were formed for each component.

Our **EWISP** competition is open to all area high school seniors, female and male, whose career plans include a four-year degree at an accredited post-secondary institution in any field of study. This program is geared toward students attending public, private, or parochial schools located (or homeschooled) within the boundaries of our Milwaukee Chapter (Kenosha, Milwaukee, Ozaukee, Racine, Sheboygan, Walworth, Washington, and Waukesha counties). This year's EWISP award will be given at the local level only as there will not be a 2021 corporate level EWISP scholarship award. Scholarship notice went out to all high schools. Our EWISP judges for this year were Gayla Jenkins from UW Milwaukee, Sadique Isahaku from MATC and last minute replacement, Laura Matthew from Marquette University. The EWISP Awards meeting was held May 4. Student awardees were Mya Johnson, University School of Milwaukee ($3,000), Emma Seefeld, Nathan Hale High School ($2,000) and Leonardo Astorga, Brookfield Academy ($1,000).

This year, **Next Door Literacy** and EWI celebrated the final year of our philanthropic partnership, with EWI awarding our annual $6,000 gift. The Literacy program and award was held July 6. This gift will be applied as a sponsorship of Next Door's 30th Anniversary event. We also hosted a Book Drive and colored book marks as an additional philanthropic effort for Next Door.

As we assessed options for our **2022 Community Partner,** the Philanthropy Committee discussed the process and objectives for selection by starting with a review of EWI's overall philanthropic goals, partnership timeframe and ability for the philanthropy focus to adjust as societal needs evolve. The committee also reviewed and ranked a short list of organizations who have literacy program services in addition to other areas of competency/training, i.e., Digital Literacy and Financial Literacy. Rocky Theisen-Kapp prepared a comparison of two organizations under consideration - She proposed that the chapter adopt a bookend approach; support of childhood and adult education services. Membership will vote on the proposed 2022-2026 Literacy partnership via paper ballot during the next Chapter business meeting.

In support of **Community Engagement**, the Philanthropy Committee coordinated volunteer and contribution opportunities for our chapter members.

- November: United Way flash card project
- December: Toys for Tots, toy contributions as well as volunteer opportunity
- February: Made 16 no-sew fleece blankets for Pathfinders
- April: Messages of Encouragement boxes with toy contributions for the Women's Center (led by Nickie Rouleau)
- May: Meta House donations for children and women (led by Jaime Wooten)
- June: Next Door book drive (led by Nickie Rouleau)
- August: School supply collection for MPS (led by Jaime Wooten)
- September: Donations for The Cathedral Center (led by Tricia Smith)

Respectfully Submitted,

Marjorie Yoshida, Philanthropy Committee Co-Chair

Philanthropy Committee: Jennifer DeLaura, Julie Frey (Co-Chair), Cortney Ihde, Abby Joyce, Jackie Makinen, Nicole Rouleau, Mary Caye Smith, Tricia Smith, Rocky Theisen-Kapp (Co-Chair), Jaime Wooten, Marjorie Yoshida

FUNDRAISING FOR OPERATIONS

This year, the Fundraising for Operations Committee has a goal of $3,380.00. This money is used towards the operating budget expenses of the chapter. The funds raised are used towards Chapter expenses (LCAM expenses for the President and Vice-President; Constant Contact and website annual fees; Google Drive Records Storage), keeping meeting fees to a minimum, and speaker expenses.

As of July 31, 2021, we are at a total of $2,792, of which $1,954.12 funds were raised during this reporting time. Thank you to all who have participated in our events! Here is a summary of our events:

- **Monthly Membership funds (Feb-May) - $915.04.** – these funds were from members who donated during our virtual sessions.

- **Holiday Meal Raffle (March) - $709.68.** This fundraiser supported member firm Hospitality Democracy with our committee hosting a raffle ticket purchase for a holiday meal from their restaurant Smoke Shack. The event sold 172 raffle tickets. Thank you to Nickie Rouleau for helping us with the event. Many thanks to all who participated.

- **Spring Flower Sale (Apr-May) $329.40.** The fundraising committee partnered with Shady Lane Greenhouse in Menomonee Falls for this Spring event. The event sold 59 vouchers. Thank you to Tina Braley for running this event!

Respectfully submitted,

Jackie Makinen, Fundraising for Operations Director

Committee: Tina Braley, Cindy Kunze, Nickie Rouleau, Lori Skerencak, Donna Munnik, Kathy Marchant, Jennifer DeLaura, Sharon Fryjoff, Roxane Theisen-Kapp, Jaime Wooten, Missy Wahlen, & Julie Asher.

RECRUITMENT AND RETENTION

In February 2021, the Recruitment and Retention Director position became vacant. At that time, we decided the best option would be to bring in two leads, I covered recruitment and Tina Braley covered retention. Lora Burback, former R&R Director, provided guidance as needed.

Membership Overview

- **Total Members: 33**
- **Member Firms: 22**
- **Total Firm Representatives: 25**
    - **This includes 3 additional representatives from (2nd reps):**
        - 1 Baird (A. Lucius)
        - 1 MMAC (C. Ortega)
        - 1 Rockwell Automation (A. Joyce)
    - **Chapter Life Members: 4** (E. Aumann, S. Fryjoff, M. Gehrman, R. Theisen-Kapp)
    - **Sustaining Member: 2** (B. Benish and L. Skerencak)
    - **Honorary Member: 1** (C. Ihde)
    - **Transitional/Individual: 1** (L. Barbian)

- **Outstanding/Upcoming/Non-Renewal**
    - **Outstanding:** None
    - **August:** Associated Bank, Environmental Innovations
    - **September:** Rockwell (Burback), Robert W. Baird (Lucius)
    - **Non-Renewals:** Kahler Slater, UWM Foundation, Alfa Flower
    - **Other:**
        - Lorie Skerencak retired and became a sustaining member
        - Rachel Adas left Harder Funeral Home but remained a member with Specialty Marketing Group
        - Lorie Barbian became our first Individual Member
        - Julie Asher replaced Terina Daniel as a 2nd representative for R.W. Baird
        - New members: Missy Wahlen with Edward Jones
        - Mke Chapter fees waived and Mke Chapter pd Corp fees (COVID policy): UWM Nursing, Lorie Barbian, 4 others were paid in the last fiscal year

- **Prospective New Members** Chapter Approved:
    - Connect Chiropractic, 10702 W. Burleigh St., Wauwatosa, WI 53222

      NAICS Code: 621310 Offices of Chiropractors
    - The Salvation Army 11315 W. Watertown Plank Rd. PO Box 26019 Wauwatosa, WI 53226

      NAICS Code: 624190 Other Individual Family Services

      NOTE: Salvation Army potential rep advised that they need to hold off considering membership for now; will keep in touch and get a feel in a few months for potential membership.
    - CMG Financial 2717 N. Grandview Blvd., Suite 200 Waukesha, WI 53188

      NAICS Code: 522310 Mortgage and Non-Mortgage Loan Brokers
    - Old Republic Surety 445 S. Moorland Rd., Suite 200 Brookfield, WI 53005

      NAICS Code: 524126 Direct Property and Casualty Insurance Carriers

- **Prospective New Members** Under Consideration:
    - Aurora Healthcare
    - Fourevamedia.com
    - Accunet
    - Edward Jones
    - We Energies

- **Prospective New Member** Targets:
    - African American Chamber
    - NAACP
    - Downtown BID
    - NWSP
    - Milwaukee Urban League
    - United Way

A complete round of membership reach-out phone calls were made in February/March. Care packages (handwritten notes, EWI Milwaukee pins, chocolate!) were delivered in July. We will continue to follow up with members that we have not seen since our return to in-person meetings.

Companies/people that we plan to target: MMAC (Cynthia Ortega), Ellen Aumann, Sharon Fryjoff, Mary Caye Smith, Margie Gehrman, Specialty Marketing (Rachel Adas), R&R Insurance (Cindy Kunze), Associated Bank (Ranya Baldwin)

Respectfully submitted,

Marjorie Yoshida, Retention & Recruitment Director

Committee: Rachel Adas, Ranya Baldwin, Lora Burback, Ginny Czarnecki, Julie Frey, TrenLan Pounds, Tricia Smith