



FROM THE

PRESIDENT

JUNE 2021



Thank You

Thanks for allowing me the honor of serving as president this last year. FEI has enriched both my personal and professional life. I am proud to be part of such a great organization with so many good people.

I truly appreciate the members and sponsors that supported FEI Dallas during this black swan year. It was not the year we expected, but we innovated and stayed useful and relevant to our FEI community. I am proud of the job we did.

So many people contributed great performances to make our success happen. I have tried to highlight some of those people, but I am sure I have left out the efforts of many more. Thanks to all our members and sponsors who provided great performances this year, your efforts did not go unnoticed!

I congratulate and wish great success to the incoming officers: Jim Howe-President, Jay Smith-1st Vice President, Jim Farrell-2nd Vice President, Debra Wood-Treasurer, and Tom Beitel-Secretary.

Some of our members took a year off for the pandemic and I look forward to welcoming them back in the fall now that things are returning to normal. I also encourage each of you to invite a great potential new member so they can share the benefits and opportunities that FEI provides.

Dallas remains the largest chapter of FEI in terms of active members with approximately 500 members.

I encourage all members to get involved to get the most out of your membership.

Recap of the Year

March of 2020 was our last meeting before the pandemic hit. We offered our first webinar in April 2020 and had 7 speakers and 326 virtual attendees. Our second webinar also had 7 speakers in May and yielded 280 virtual attendees. Thanks to Jens Mielke and our staff for helping make those possible.

During the summer, all three university partners The University of Texas at Dallas, University of North Texas, and University of Dallas, held webinars as part of our Summer Professional Development Series.

Our first monthly meeting of the new fiscal year took place in September as a webinar. Members were offered a nice bottle of wine provided by the chapter.

Our October meeting featured our first dual-format (in-person and simulcasted virtual) chapter meeting. Our staff went above and beyond to allow for a mix of in-person and virtual speakers and attendees. In-person attendees enjoyed networking outside on the grass and our virtual members enjoyed a free Grubhub meal at home.

For the rest of the year chapter meetings averaged about 60 attendees in person and 180 virtual attendees. Virtual attendees continued to have free Grubhub meals. Along the way we added breakout rooms for virtual networking.

Our final chapter meeting in April 2021 had 140 in-person attendees and 220 virtual attendees.

One meeting during the year, I got off the timeline for the meeting and started announcements from the podium early and panicked the whole staff. It's good to keep everyone on their toes and guessing.

Both professional development and dinner speakers for the year were excellent.

Dinner speakers discussed ridesharing, Esports, economic issues for women in Texas, technology, real estate in Dallas, Dallas's business future, changes at the SEC, and Wingstop.

Professional development topics included robots and AI, private equity, the 2020 elections, effective board membership, KPMG's annual update, cybersecurity, and priorities at stages of life.



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Special interest groups and peer groups continued virtually during the year.

The pandemic brought FEI chapters across the country closer together as we shared ideas and content to better serve our members.

The Financial Executive Experience was expanded and strengthened this year.

Socials included a career management virtual wine event in December 2020, a chapter virtual wine event in February 2021, a Culinary Tour Diner Party and dance in May 2021 that had almost 200 attendees, and our annual golf/wine event which is scheduled in June 2021.

Our incredible staff including Jackie Dunn, Nancy Ehlers, Emily Colgan, Gwen Jewett, and Sharla Hibberd does great work and makes all of us look good.

Because previous leadership left us financially strong, we were able to reduce member dues and sponsor fees for the pandemic year in recognition of challenges the year presented. I am happy to advise that we will end the year in an excellent financial position.

Sponsorship

Please remember to thank our sponsors who support our chapter both monetarily and with their service. Give them a chance to earn your business when opportunities arise.

The Culinary Tour Dinner Party

It was wonderful to see so many members and their plus ones out and having fun at our Culinary Tour Dinner Party sponsored by Marsh & McLennan Agency.

Approximately 200 attended the event held Saturday May 22 at Venue Forty|50 in Addison.

Once again Darin Patrizi and May Lee Harris and the FEI Dallas staff did a stellar job of putting on a social. Their imagination and hard work made this great event happen.

Darin has been responsible for socials for several years and golf outings for even longer. This will be Darin's last year leading the social committee as he focuses on his new CFO role.

The party included a social hour with singer and guitarist Noel Kerns providing background music. The Wendy Krispin catered dinner was excellent and was a culinary tour. After dinner we danced to band Time Machine. Music videos were played during dinner.

Thanks to Marsh & McLennan Agency for sponsoring this social and to Holmes Murphy & Associates for being our Special Events Sponsor this year.

Up Next

Our annual Spring Social – a Golf|Wine event – at The Clubs of Prestonwood Creek Clubhouse is being held on June 14th.

Our Summer Professional Development series is presented by our university partners: University of Dallas, University of North Texas, and The University of Texas at Dallas. The series kicks off on June 29th with University of Dallas' webinar discussing working remote versus the office.

Keep In Your Thoughts

For those who have been injured, ill or lost family members, our thoughts and prayers are with you.

Member John Bailey has been battling cancer and undergoing chemotherapy. We wish him a speedy and full recovery.

Please let me know if others are dealing with challenges and of any way we can help.

Ron Rushing
FEI Dallas Chapter President