Meeting RECAP

Attendance: Co-Chair Brian Brockhoff, Co-Chair Shawn Kelley, Christine Carleton, Mark Cinquina, Nathan Bachrach, Julie Heath, Chad Summe, John Frank Jr., Steve Wanamaker, Crystal Faulkner, Peg Valentine, Jaclyn Smith, Adrijana Kowatsch and Lorrie Penner

I. Welcome
Brian Brockhoff opened the meeting.
Since Chad Summe was unable to attend the Board of Trustees retreat in December, Chad gave his background information to the committee. He worked with P&G for 6 years before creating a new business in Mason, coupons.com. The company is well established in the Silicon Valley, but new to this area. Chad has a real passion for education and was introduced to the Economics Center by Board member, Bill Robinson.

II. Overview of Annual Awards Luncheon
  - Date: March 27, 2014. Location: Hyatt.
  - History of the luncheon – Adrijana Kowatsch shared that the luncheon developed out of the celebration of the 30th Anniversary of the Center. The event was so successful that the Center continued on annually because it turned out to be a great “friendraiser” for the Center and to a lesser extent a good fundraising event.
    We have found over the years that attendance for the event is mainly driven by the choice of the Keynote speaker.
    The purpose of the event is; 1. Raise money for the Center’s programs , 2. Broaden the sponsorship base, 3. Bring the Center’s Mission and Vision to the business community.
  - Awards – the luncheon provides the stage for the annual awards to educators, students and community partners. At this point an award for Kroger has been confirmed and a principal at Roberts and some students at Deer Park have been selected as recipients. Other award winners will be decided shortly.
    It was recommended that the Center reach out to the Deer Park school’s partners to attend the luncheon.
  - Reception – Julie will explore the possibility of having Mr. Zandi, Mr. Rodney McMullen and UC President Ono attend a pre or post- luncheon reception. If Mr. Zandi is unable, the recommendation is to have a reception with Mr. McCullen and Dr. Ono if possible. The attendees to this reception should be sponsors at the Silver ($3,000) level or higher.
  - Open Forum – before or after luncheon, it was recommended that an open forum with Mark Zandi might be a draw to financial professionals.
- New committee members – there was a discussion about having someone from Kroger be on the Luncheon Subcommittee. They could help identify who should be in the room from Kroger. TBD based upon Julie Heath’s conversation with Mr. McMullen.

- PR/Marketing – Nathan Bachrach and Brian Brockhoff will see what can be secured with Channel 19 to bring a camera crew to the luncheon. Nathan has also offered to interview Mark Zandi for his radio program. Julie Heath has cleared this with Zandi. Nathan to schedule with Zandi’s assistant.

- Enquirer – is the media sponsor. They will give us 5 ads in Sunday papers leading up to the luncheon and also put the Center’s link in their business email news. Article on the keynote before the event is also likely.

III. Sponsorships
   - Opportunities for Presenting Sponsors could come from Kroger connections. Ohio National was also discussed as a possible sustaining sponsor. Ohio National currently is a sponsoring partner for the Stock Market Game (SMG) winning Portfolio Challenge winners NYC trip. Their annual luncheon sponsorship is $5,000 each year.
   - Opportunities for additional sponsorships; the committee worked through the past sponsor list and some new targeted businesses.
   - Kroger partnerships - Julie will reach out to McMullen office and ask about who may help us identify businesses and individuals that he would like to see attend the luncheon. Peg Valentine and Nathan Bachrach identified a couple of connections they have at Kroger and will follow up after Julie gets a contact person from Mr. McMullen’s office.
   - The committee reviewed the sponsorship levels; Platinum ($10,000), Gold ($5000), Silver ($3000), Bronze ($1500).

IV. Assignments/follow up
   - Center staff will send out the list of potential sponsors and the assigned committee members.
   - Center staff will send some Talking points regarding the luncheon to the committee members
   - A copy of the “Save the Date” email will be sent to all of the committee members.

V. Next Steps
   The committee members have agreed to a weekly call in to update progress. The call in will be every Friday at 9am. Lorrie will send an Outlook calendar invite with the conference call number to the committee.

Mission: As a thought leader in the community, the Economics Center provides the knowledge building blocks for a stronger economy through education and research. Our student-based programs, interactive tools and professional development improve the economics and financial literacy of school children and young adults. Our research and consulting empowers business and civic leaders to make informed policy and economic development decisions.