



2014-2015 Season
 Russell Goldstein, President
 Frank Bourget, Vice President
 Claudia Cucitro, Treasurer
 Lindsey Jackson, Secretary

**2015 Summer Forum _Sponsorship Committee Call
 November 11, 2014
 10:00am**

Committee members

Attending	Committee Members	SF Committee Focus	Organization	Email/Phone
Yes	Diane Jezek-Powell	Sponsorships Chair	Gomper's Habilitation Center	Djezek-powell@gomperscenter.org 602-283-3931
Yes	Liz Kaplan	Sponsorships - Co-chair		LizKaplan11@gmail.com 602-463-1240
Yes	Tiffany House	Sponsorships Committee Member	MasterTech Financial	tiffany@mastertechfinancial.com 480-905-3260 480-242-9956
Yes	Russell Goldstein	PGRTAZ President	US Trust, Bank of America Private Wealth Management	Russell.goldstein@ustrust.com 602-523-2924
Yes	Stephanie Weadock	Administrative Support	Premium Organization	info@pgrtaz.org 602-840-2900

Link to a recording of the call:

http://apps.calliflower.com/recording/download/63175?rec_key=03d79aba7c72221f335e128f7a69e5f9b07f19da

Attendees can refer to the recording of the call for detailed discussion. These notes are meant to capture mostly action items and highlighted matters of discussion for taking action.

An opening round was conducted

Action Items:

Assigned	Action Items	Target Due Date
Stephanie	Forward most current sponsor opportunities/benefits summary and sponsor commitment/invoice form to committee members	11/11/2014
Diane	Consolidate sponsor historical information and forward to committee members	11/14/2014
Russell	Reach out to Cresendo for a possible sponsorship	11/26/2014

Sponsorship forms (Stephanie)

Stephanie advised the sponsorship opportunities and benefits summary and the sponsorship commitment/invoice form have been updated to include the closing plenary opportunity. These update forms will be forwarded with the notes of this call. All were encouraged to have these two forms at hand when doing outreach to potential renewing and new sponsors



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Summer Forum Committee Reference Page (Stephanie)

All have been tagged as SF committee members within their online profiles. Logging in to the website as a member will also allow all to see/access the SF committee reference page. This page is a sub page of the "Annual Summer Forums" tab located in the left margin of page options. Items on this page:

- Committee members includes emails and phone numbers
- Target dates
- Goals
- Reference Tools: Stephanie will post the most current sponsorships outreach status' and opportunities available constantly as updates are forwarded to info@pgrtaz.org. All were encouraged to access this resource in obtaining most current status', etc.
- Committee meeting materials/archives: Going forward, meeting agendas and reference items will be posted to this page with notice to all to access/download from the website.
- Prior years' archives

All were encouraged to take some time to access/review this page to become familiar with it as it will be used extensively throughout the planning of the event.

Diane will consolidate historical information sponsors and distribute to all for reference as needed.

2014 Sponsor Lists (Diane and Liz)

A review of the 2014 sponsors list resulted in assignments for outreach. The assigned outreach is noted within the 2014 sponsors list for reference. Updates and outreach feedback will be sent to info@pgrtaz.org for updating the spreadsheet and posting to the committee reference page of the PGRTAZ website.

Target deadlines.

- Sponsor renewal outreaches and feedback: **11/26/14**
- Begin new sponsorship appeal: **12/1/2014**
- Re-evaluating outreach and determining if we need to expand the asks beyond our current lists: **12/2014**
- Deadline to be included on the Save the Date piece: **12/12/14**
- Sponsorship secured and **funds received** to be included in proceedings booklet: **5/11/2015**

Calendar next call

November 25th at 1pm

The meeting was adjourned at 11am