



— C H A R L O T T E —

Welcome New PDA Members!

As Spring is upon us, we wanted to welcome our 13 new Chapter members who have joined since mid-March (as of last week) including:

Jonathan Aguallo, Charlotte, NC

Melody Barrows, Charlotte, NC

Rich Campbell, Charlotte, NC

Mikail Clark, Charlotte, NC

Marise Fernandes Kumar, Charlotte, NC

Kris Fetter, Charlotte, NC

Sara Garces Roselli, Charlotte, NC

Doug Gawrych, Charlotte, NC

Carlene Pollock, Huntersville, NC

Prabhu Ramkumar, Charlotte, NC

Paul Solitario, Charlotte, NC

William Stubbs, Greenville, SC

Adam Weisman, Denver, NC

With our latest member additions, the Charlotte PDA Chapter is now approaching 100 members, a big thank you to all members! As a reminder, you can access the PDA member Directory on the PDA website, search by Chapter to view all Charlotte Chapter members should you desire to make an outreach.

Member Profile

Speaking of using the member Directory, you will get enormous value from completing your Member Profile on the PDA website.

This is how other members nationwide find you, including active private company founders, owners and Board members seeking to form a Board or add new/replacement Board members. The PDA is a rich network of professionals whose common interest is private company Board governance excellence, so please access the Directory when in need of such resources.

It only takes 15-20 minutes to complete and is easy. Unlock the value of your membership by completing your profile if you haven't already done so.

New Member Orientation Virtual Zoom Meeting on Thurs., June 10 at 8:30 a.m.

The Chapter will be holding a one-hour new Member on-boarding Zoom Meeting for all new members who have joined the PDA Charlotte Chapter since January 2, 2021. Existing members are welcome to join as well. Registration communication to follow shortly.

PDA national organization updates

A PDA national Member Survey was completed in early April. The participation rate was an astonishing 25%+ which is way above the norm for organizational member surveys. Overall feedback was directionally quite positive and results are expected to be released to the membership base soon.

As of last week, the PDA is now over 2500 members nationwide across 20 city Chapters and growing.

Alan Aldworth, President/CEO has been busy since late December streamlining the organization and adding resources where needed to deliver more educational benefits for members. PDA University is now active with the Director Mentoring/Coaching program initiated with the first 50 member +/- cohort rolled out. We now have a professional national Educational Webinar Director, a Marketing Director and a Member and Engagement Director added to the PDA staff to accelerate the quality level of our educational offerings to members, increase/expand our national brand recognition/offerings and enhance our member experience.

Program Planning for 2021

The Chapter Program & Education Committee is currently working with a nationally recognized Chapter sponsor on a Webinar Program series to include Digital Transformation and ESG themes impacting private companies today.

We are planning to launch the first such webinar **on June 17 at noon EDT**, co-sponsored with **BofA**. The webinar program is titled "**From the C-Suite: CEOs unpack their Digital journey**". In this session, we welcome Julie Harris, Head of Global Banking Digital Strategy, Bank of America to set the stage, highlighting technological advances driving business strategy. You will hear from CEO guests who have made innovation and digital transformation core to their growth strategy. We will also have a digital expert on the panel from IBM who has facilitated many such transformative projects. We will explore the strategic and governing oversight provided by private company boards from the c-suite perspective. The webinar program is expected to be announced shortly.

We do intend to return to some level of in-person Program Events in the 2ndH 2021. Currently the Program & Education Committee is working on a "Back to School" networking event to be

held at an outdoor venue in September. The event will include a subject matter expert speaking to the expected economic growth in the greater Charlotte region in a casual setting.

Are there specific topics Chapter members desire the Chapter to offer?

- Please let us know your thoughts/ideas
- Please consider joining the Program and Education Committee (“P&E”) to get involved and make an impact

Allen Look is joining Katherine Armstrong as Co-Chairperson of the Program & Education Committee beginning in June. Please welcome Allen in his expanded role on the committee!

Committee Membership Opportunities to Engage

Program & Education Committee – recruiting new members

Member and Engagement Committee (“M&E”) – recruiting new members

Sponsor Committee – recruiting new members

- We recruit corporate sponsors to financially support the Chapter’s initiatives.

A special thanks to our current sponsors, BofA, EY and GreerWalker!

A Chapter Volunteer organization

As an all-volunteer Chapter organization, we have found that those who seem to gain the most from their membership are those who get involved in Committee activities, building the Chapter and delivering the PDA to other members. Better and more exposure to PDA national officers, committee chairs, other PDA members across the country.

Please let us know your thoughts on how we can best meet your needs in delivering the resources of the PDA to you as a member.

Regards,
Mike

Mike Airheart
President
Charlotte PDA Chapter