

Board Meeting Minutes

May 13, 2025

Virtual

12-1:30 pm

In attendance: Christy Purgason, Billie Jo Brooks, Danielle Dann, Kathy Scourby, Abigail Davis-Hess, Liz Coleman, Jennifer Hobson, Grant Tschudy, Ryan Clawson, Davie Cumming

Not Present: Michael Keatts, Joe Loving, Erin Polley

President's Comments – Christy Purgason

- Certifying Board for 2025-2026
- National
 - Richmond members currently registered: 8
 - 4 of our buddies from Hampton Roads are also attending
- Log Color Change and impact- No update
- CLI
 - Kathy/Joe - Yes
 - Billie Jo - Yes

Membership – Billie Jo Brooks

- Katelyn Vise no longer with Meyer Goergen. Replacement will be Cary Doak.
- Prospective member event for those that are new and for members of National not with the chapter - Sept/Oct event

Secretary's Report/Approvals – Danielle Dann

- Approval of Board Meeting Minutes from 4.08.25 - APPROVED
- Approval of Member Meeting Minutes from 4.22.25 - APPROVED
- Member Survey Results from April Member Meeting
 - 5 Respondents
 - 4.8/5 for Topic & 5/5 for Venue
 - Feedback :
 - Mixed opinions on conciseness of presentation
 - Positive feedback:
 - "I thought Kevin did a good job of understanding the various marketing techniques for different types of firms. Lots of information. Very informative. Looking forward to getting the slide deck."

Business Partner Liaison – Liz Coleman

- Payment Status update
- 2025 Summer Happy Hour BP sponsor and Schedule
- BP sponsors schedule for 2025 remaining meetings
- BP Platinum/Diamond/Gold/Silver social schedules
- Update on potential BPs for 2026
- Discuss Quarterly coffee meetings and continuation ideas

Treasurer's Report – Erin Polley

- Tax Exemption status
 - Requested form on 11/11 but did not see determination letter, just tax forms.
- Tax Return- Pending approval/submission
- Treasurers report

Programs & Education Chair – Dave Cummings

- Draft calendar
 - May- Abby- thank you for coordinating that
 - June 25- Breaking Barriers- DEI- Willow Oaks
 - July- we need to switch out Abby and see if Joy from MLM can do Conflicts presentation. Does anyone have capacity to reach out to her?
 - August- we need her speaker form so we can load it on the website
- Catering Event update

CLM Education Chair – Abby Davis-Hess

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Communications – Abby Davis-Hess/Ryan Clawson

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Community Outreach and Caring Chair – Kathy Scourby / Joe Loving

- James River Clean-up looking at June

DEI Committee Update: Jenn Hobson / Grant Tschudy

- 2026 Mapping plan and ideas for Inclusion themed year

Virginia Statewide Retreat Chair – Michael Keatts

- Retreat recap
- Richmond interest for Retreat Committee for 2026 and beyond.