



PORTLAND EXECUTIVES ASSOCIATION

New Member Welcome

Mailing address: P.O. Box 4342, Portland OR 97208
Bob Hess, Executive Director Phone: (503) 784-9962
Web Page: www.pdxex.org Fax: (971) 230-3384

Welcome to Portland Executives Association. The following information is intended to help you learn about our leads & networking association.

What you will receive:

- Password: You may assign your own password for access to Portland Executives Association's web site.
- The name of a tenured member who will assist as your mentor during your orientation.

First task:

You may go onto our website by entering your User Name and Password and look up any member using the 'Member Information' drop-down along the top of the page. Look up several members and use their Profile page as an example of the profile information we are looking for.

Weekly General Meetings:

- Portland Executives Association general lunch meetings are every Thursday, except designated holidays, from Noon to 1:30 pm.
- These meetings are held in the Mayfair or the Crystal room at the Benson Hotel. You will be notified in advance if the meeting is elsewhere.
- The cost for lunch at these meetings is currently \$22.50, unless otherwise noted. The Benson Hotel accepts checks, cash and credit cards. Meetings at other venues may only allow checks or cash but the membership is notified of conditions in advance of the event.
- You will usually receive a weekly phone reminder of the lunch meeting. The caller will pass along any additional relevant information.
- Notice of meetings and other information is also sent via e-mail every Sunday evening for the following week's lunch meeting. It is also available on the website bulletin board. (www.pdxex.org).
- Dress code is "business attire", unless otherwise noted (jacket, but tie is optional for males).
- Members must be present for Roll Call at the beginning of every lunch meeting to qualify as having attended. Every effort should be made by members to attend the entire meeting.

- During roll call members introduce themselves by name and company affiliation. A member may give a brief description of the product or service provided by his/her firm or recognize other members for products or exceptional services rendered.
- Excused Absences are granted only when the member notifies the Portland Executives Association office. Members may communicate with the office by telephone, text or e-mail, but notification must be made not less than two days prior to the lunch meeting. Failure to notify the office may result in an Unexcused Absence.
- When you pay for lunch you will receive a small slip of paper that you must fill out with your name and member number. You may deposit the slip of paper in the bowl at the beginning of the buffet line. Since the slip of paper is used to verify attendance, please fill it out and turn it in even if you do not eat lunch.
- A fine may be levied if your cell phone audibly rings during meetings of the Portland Executives Association. There may also be a fine for errors in protocol, such as not wearing a jacket (men) or name badge. Members and Associates from the same company should not sit at the same table during lunch. A fine may result. This is all at the discretion of the President & is done in good taste & in the spirit of camaraderie!

Leads:

- The Profile page includes definitions of Leads. Members are encouraged to ask mentors or the Executive Director for assistance on any Leads questions.
- Direct and Market Intelligence & Support Leads must be submitted (using the website) no later than 10:00 a.m. every Friday. Leads are due regardless of vacations, travel or other issues and may be submitted 24/7.
- Failure to submit leads by 10:00 a.m. each week counts as a “miss.”
- Members’ Leads, Attendance and Participation are reviewed cumulatively every six months.
- Leads should be submitted via the web site (www.pdxex.org).
- It is acceptable to submit Leads by telephone or e-mail, if you are otherwise unable to access the internet.
- A Leads report is always accessible to members on the website. The office can assist you with any questions you may have. If you wish to track your Leads, the office will demonstrate how you, as a member, may access your Leads records.

Leads Review Meeting:

New members are asked to attend the Leads Review Committee, when possible, for the first few months of membership.

- The Leads Review Committee typically meets every Monday from Noon to 1:00 p.m., unless otherwise noted.
- The Leads Review Committee ordinarily meets at the Paramount Hotel
- Lunch currently costs \$19.00 inclusive of gratuity. You will be able to choose from a PDXEX menu for this event.
- Members may arrive as early as 11:30 a.m.; however, the business meeting begins at Noon.

- The Leads review meeting lunch is a great opportunity to get to know members and learn in more detail the nuances and intricacies of the Portland Executives Association.

Mentor:

New members will be assigned a mentor who may provide additional information about the Portland Executives Association. Together, the new member and mentor will determine how much coaching is desired. Members are always welcome to ask the office or any other member for assistance.

New Member Assimilation:

New members will be invited to attend a New Member Assimilation Breakfast with members who will provide personal history and insight into the Portland Executives Association. These meetings are generally scheduled once per six-month term.

New Member Introduction

New members will be contacted by the Chair of the New Member Assimilation committee about a New Member Introduction as soon as scheduling allows. New Member Introductions are given by another member and focuses mainly on the personal aspects of the new member. They are 2-3 minutes in length & use no a/v.

Trade Talk

Although each member receives a Trade Talk approximately every three years, new members will receive a Trade Talk as quickly as the schedule allows. A Trade Talk focuses on the new member's business informing other members in the Association how to assist the new member's business with Leads. It may be from 5 to 7 minutes long and is given by another member, who will be assigned to give the presentation.

Leads Presentation

At any time members may request the Executive Director to visit a member's business and provide a presentation to employees to help familiarize them with Portland Executives Association.

Executive Body:

The Board of Directors, comprised of four officers*, seven committee chairs and one co-chair serve two consecutive six-month terms. A fifth non-officer* position, the Vice President, serves one term.

Committee Assignments:

Committee assignments are made every six months and may include, but are not limited to: Leads, Reception, Attendance, Program, Trade Talk and New Member Assimilation. Coordinators for each division (one per division) comprise the Membership committee.

Organization:

Portland Executives Association currently has approximately 103 members and 43 associate members. Each member is assigned a membership number. Associate members have an "A" after their membership number. The Portland Executives Association is organized into eight Divisions that include:

Automotive/Transportation
Construction
Hospitality
Insurance/Finance
Health & Wellness
Office and Service
Retail
Sales Communication

In addition to committee assignments, member divisions may communicate or meet periodically. Each division is given at least one lunch meeting during the year to host a program showcasing their members.

The Portland Executives Association operates through the volunteer efforts of the membership. It has one full time Executive Director, Bob Hess and a part-time administrative assistant, Laura MacLean.