



Regional Leaders Manual

CFESA REGIONAL LEADER MANUAL

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The CFESA Board of Directors would like to personally thank you for your commitment to see the Regionalization of our industry succeed by volunteering as a leader of your region. This is a tremendous opportunity to facilitate the advancement of your organization as we unite with allied associations.

Experience has shown that successful local group leadership is not measured by personal accomplishment; rather, it is based on the kind of leadership that inspires group accomplishments.

This manual is designed to familiarize you with some of the fundamental principles of effective local region management. Implementation of the suggestions and guidelines will help strengthen the foundation of your region. There are no formulas for success in running a CFESA region, but you'll be off to a good start if you thoroughly review this manual and use the available assistance from the CFESA National Headquarters or other Regional Leaders.

CFESA Headquarters is available to help you with all aspects of your regional meeting. We can help with the organization of each meeting, assist you with the agenda, type and distribute information, such as agendas, schedules or minutes, to the region members, work with the meeting site to arrange room reservations and menus and anything else that you may encounter while planning your meeting.

We ask that all correspondence to region members be submitted to Headquarters prior to circulation, this is to ensure that the regional meetings help enhance the CFESA national conferences and mission statement.

Please contact CFESA Headquarters when your region has a meeting scheduled.

MISSION AND VISION STATEMENT

The Vision of the Commercial Food Equipment Service Association (CFESA) is to be recognized as the standard of excellence for servicing commercial food equipment. (Revised 2011)

The Mission of CFESA is to anticipate trends and provide resources, training and education to support excellence in service. (Revised 2011)

CFESA REGIONAL LEADERS RESPONSIBILITIES

1. Each region will host at least one meeting per year.
2. A tentative agenda will be published upon first being approved by CFESA Headquarters. The agenda should be followed and contain old business, new business and open discussion for new business topics. The agenda should close with the solicitation of a host member and tentative dates for the next meeting.
3. At the start of each meeting, the leader will appoint a secretary for minute taking. CFESA Headquarters will mail following the meeting, these minutes, to all meeting attendees for comments and suggestions after first being reviewed by CFESA Headquarters.
4. At the start of each meeting, the leader will read the CFESA Mission and Vision Statements.
5. At the start of each meeting, the leader will read the CFESA Compliance with Antitrust Laws statement.
6. The leader will conduct a general introduction of members and guests.

REGIONAL STRUCTURE

Each region will be made up of the following:

Regional Chairperson

- Holds an elected two-year term for no more than two consecutive terms;
- He/ She appoints a regional co-chair as an assistant;
- Solicits the host for any regional meeting;
- Appoints the regional secretary;
- Is responsible as the regional liaison to CFESA National Conferences;
- Assists the regional host in maintaining the discussions of the published Meeting agenda;
- Assists the regional host with proposed meeting expenses and budgeting;
- At the end of his/her term, conducts the regional election for his/her replacement;
- Approves meeting agenda and minutes and forwards to CFESA Headquarters.

Regional Co-Chair

- Works with the secretary on meeting agendas for approval by the Chairperson;
- Works with the secretary on meeting minutes for final approval by the Chairperson;
- Assists in conducting the regional meeting;
- Replaces the Chairperson in his/her absence.

Regional Secretary

- Primarily records the requirements for set up of the regional meeting agenda;
- Handles the regional correspondence;
- Takes minutes during a regional meeting and finalizes the minutes to be submitted to the regional chair and co-chair.

REGIONAL MEETING EXPENSE ALLOTMENT

The CFESA Regional meetings are provided funds to cover meeting expenses. Each region is allotted \$2,000.00 per year for these expenses. The expenses that go beyond this dollar amount or expenses that are not eligible are then divided evenly among the regional meeting attendees who are then invoiced the remaining balance.

Eligible CFESA Regional Meeting Expenses:

1. Banquet Meeting Room Rental Fee (day of the meeting)
2. Audio Visual Fee (day of the meeting)
3. Continental Breakfast (day of the meeting)
4. Lunch (day of the meeting)
5. Beverage Service (Coffee/Assorted Sodas, Juices) (day of the meeting)
6. Meeting Materials (copies, badges, attendance sheets, etc.)
7. Thank you gift for non-paid speaker (provided by CFESA HQ)
8. Speaker fee, hotel expense (one room night), coach airfare

Example of Expenses Not Covered Under the Allotment:

- Alcoholic beverages
- Speaker gifts not provided by CFESA
- Optional activities
- Dinner

REGIONAL MAP

Region 1:

Alaska, California, Colorado, Hawaii, Idaho, Montana, Nevada, Oregon, Utah, Washington, Wyoming;
Canada – Alberta & British Columbia

Region 2:

US states of Illinois, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, South Dakota, and Wisconsin. Canadian provinces of Manitoba and Saskatchewan.

Region 3:

Arizona, New Mexico, Oklahoma and Texas. Mexico is also included in this region.

Region 4:

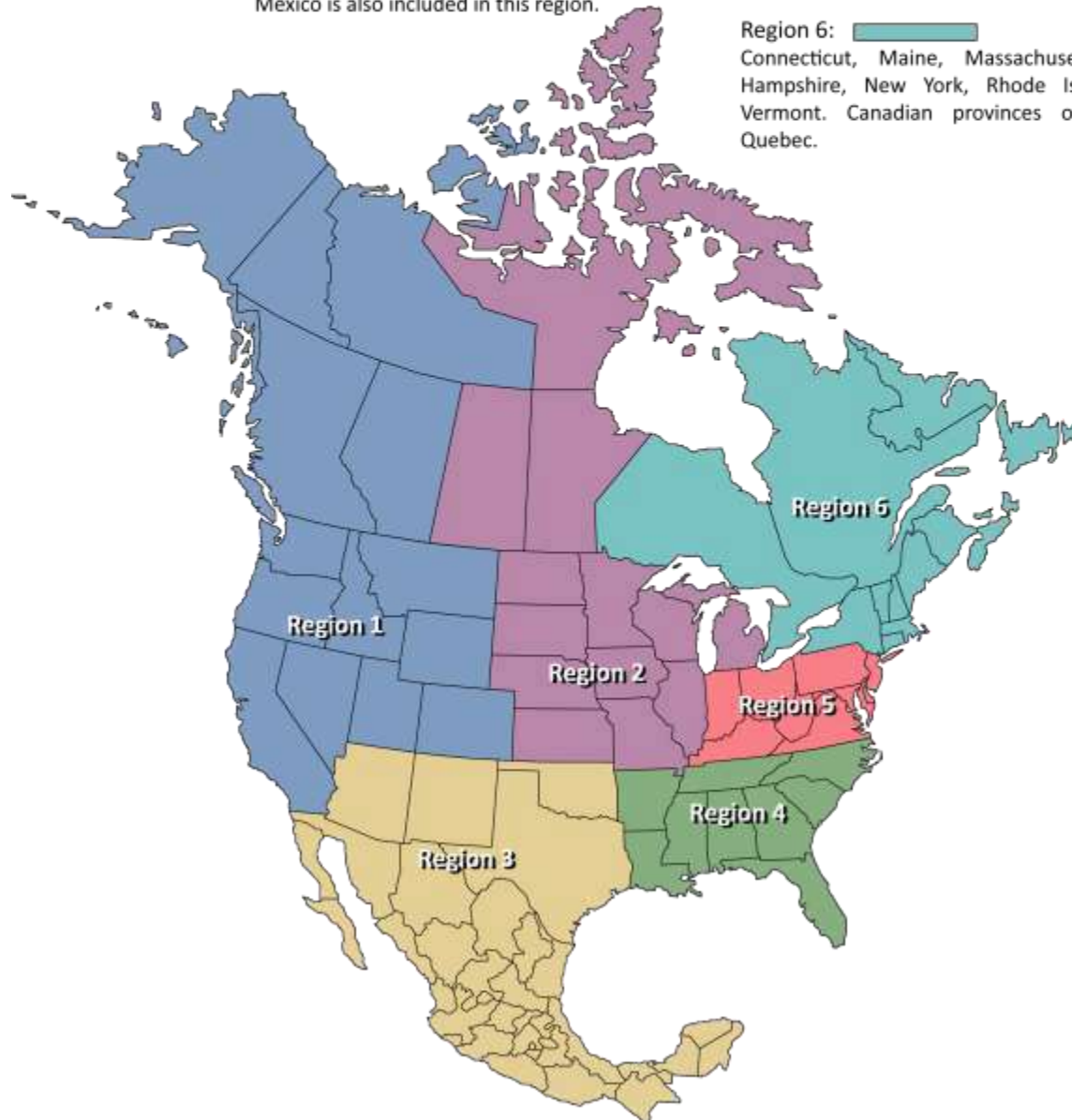
Alabama, Arkansas, Florida, Georgia, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee.

Region 5:

Delaware, Indiana, Kentucky, Maryland, New Jersey, Ohio, Pennsylvania, Virginia and West Virginia.

Region 6:

Connecticut, Maine, Massachusetts, New Hampshire, New York, Rhode Island and Vermont. Canadian provinces of Ontario and Quebec.



WORKING WITH CFESA NATIONAL HEADQUARTERS

Contact at CFESA Headquarters:

Heather Price

CFESA Executive Director

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Fort Mill, SC 29715

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The Regionalization Committee and the Board of Directors are committed to developing an active network of CFESA Regions and encourages all Regional Leaders to take advantage of all the assistance available from the National Headquarters.

All activities at the Regional level must, as with National Association activities, comply with all State and Federal laws and regulations, and with all policies set by the National Association. It is the responsibility of the Regional Leaders to ensure compliance. The Regionalization Committee and Board of Directors are responsible for monitoring CFESA regional activities, as they can have a direct impact on the National Association. Further information on compliance with Antitrust Laws is enclosed in this manual.

All agendas and correspondence for regional meetings should be sent to the CFESA National office for review by CFESA's legal counsel before any meeting publicity is mailed to the membership or other public. Unless the agenda is approved the region may not conduct a meeting.

In addition, CFESA headquarters will collect any money required from the members to attend a meeting. A budget of \$2,000 per region per year has been set aside to facilitate the success of regional meetings.

CFESA COMPLIANCE WITH ANTI-TRUST LAWS

The purpose of antitrust laws is to preserve a competitive economy in which free enterprise can flourish. CFESA unequivocally supports the policy of competition served by the antitrust laws and reaffirms its intent to comply in all respects with those laws. This policy shall be made known and adhered to in the course of any activities pursued by all association officers, directors, regions and members.

This policy shall be read at the commencement of each regional meeting.

1. It is unlawful to discuss specifically named supplier or customer information (positive or negative) in the presence of his competitors. (Because if a specific supplier or customer is identified, such discussion carries a greater risk than does a general industry discussion).
2. It is unlawful to elicit any collective action against any supplier or customer.
3. All statements made should be factual, true and based upon the speaker's actual experience or present knowledge. No one should request or suggest that others refrain from doing business with the named company or only do business on certain conditions. No one should state what future action, if any, he or she intends to take with regard to the named company. No one should suggest any future actions or policies, which might be taken by attendees individually or in conjunction with others.

REGIONAL MEETINGS, PROGRAM TOPICS, SPEAKERS & IDEAS

Why Have Regional Meetings?

Meeting programs, which focus on problems encountered by the foodservice equipment industry, are the key to successful regional activities. The responsibility of the Regional Leader is to provide programs about the industry that will attract the owners and managers of individual businesses.

Every regional program should be put to these two tests:

1. Will this program be of such importance that every single member of the region will be represented at the meeting, and
2. When a member leaves the meeting, will they have new information of direct benefit to their company?

What Kind of Meetings?

The type of meetings held depends largely upon the makeup of the regions and the needs of the members. Larger regions may choose to plan two meetings a year, with morning, luncheon and afternoon sessions. All day sessions such as these dealing with timely subjects are effective since members come from distant locations and do not have sufficient opportunity over lunch to meet and discuss common problems with other members. Regions that are closer in may try to hold evening dinner meetings. Regardless of the type of meeting and program held, several fundamentals apply:

1. Hold meetings regularly with plenty of advance notice.
2. Meeting notice should announce the subject matter or speaker and should “sell” attendance.
3. Conduct the routine portions of the meeting efficiently.
4. Develop a variety of programs that will appeal to all types of members.
5. Key the programs to the practical aspects of the Foodservice Equipment Industry.
6. Encourage participation in Regional activities and programs by all members.
7. State your agenda so that members will attend.
8. CFESA staff assistance is available to all regions upon request.

SUGGESTIONS & TOPICS FOR FUTURE MEETINGS

- 1. Smaller Regions** - Break up larger regions into smaller ones that are within a reasonable driving distance. This way you can meet on a more regular basis still having one or two joint meetings a year.
- 2. Where to Start** - Organize meetings with regional CFESA members first.
Other industry associations can be included later. It is important to organize and develop a schedule of topics and locations. The following are some suggestions for starters:
 - Publicize all correspondence regarding these matters to every member and highlight the participants.
 - The hosting member could chair the meeting at their facility. This will attract other non-participating members and Allied Associations could be invited at the appropriate time.
- 3. Collection Problems** - Collecting past due warranties and invoices as a topic for discussion. Maybe there is a common problem or solution. How do we handle our problems with regular customers?
- 4. Service Contracts** - How many members offer contracts successfully? How many contracts have you sold? Do you flat rate P/M's for each piece of equipment? Do you cover blanket labor as well as P/M contracts? Do you have checklists for each piece of equipment serviced? What is a P/M inspection?
- 5. Hiring and Retaining Employees** - Does your company have written job descriptions for every employee? Are there written procedures for their individual job descriptions? How is your company structured? Could you provide a chart of your company structure in the order of departmental breakdown and reporting relationship?
- 6. Training / Education** - Think about all of your employees in terms of training. Product Knowledge Workshops, Custom PC Training Classes, Web Page Creation and Maintenance, Refrigeration Class 1, 2 & 3 Certification, Employment Opportunities and Solutions, etc.
- 7. Marketing Locally and Regionally** - Do you have a marketing program? How do you select your marketing goals? Do you have a sales staff? How do you plan their schedule, review their efforts and compensate on their success?

- 8. Allies** - Do you believe that a large part of the industry is built on strategic alliances? Can you describe how you have achieved your best relationships with your area: reps, dealers, consultants, factories, associations and customers? From these responses, we believe a mutual plan of training and education could be assembled to really make us all much more professional and profitable. Common CFESA marketing tools can be assembled and made available when needed, i.e. Who to Call Sheet, Start up and Equipment Demo Procedures, Preventive Maintenance and Service Contracts.
- 9. Computer Systems** - What kind of hardware and software do you use? If you were to replace your system, what things would you look for?
- 10. EDI** - What is in it for my business? Now and in the future? Do you use it with any manufacturers or service companies now?

SOURCES OF SPEAKERS AT NO CHARGE

1. Major utility companies (gas and electric) can provide speakers at no cost.
2. Telephone companies can provide speakers on:
 - Management Information
 - Teleconferencing
 - Telemarketing
3. Major banking and lending institutions frequently provide speakers on financial topics and credit management techniques, as well as local, regional and national economic trends.
4. Another source of no charge speakers are the many computer and computer related companies. Whether the companies are large or small, representatives have a series of non-technical presentations that can be geared to Regional Meetings, many with “hands-on” programs.
5. The end-users of foodservice equipment cannot be overlooked as sources of programming.
6. With regard to programs on “product knowledge,” the manufacturers become a good source for speakers and/or panel discussions and forecasting trends.
7. Local, state and federal government agencies, such as OSHA, are always looking for organizations to speak to. It is not always the elected representatives that present the good programs. More often than not, it is the career bureaucrat that can actually speak to the how’s and why’s the government acts as it does.
8. An excellent source for Regional programming is the CFESA membership itself.
9. Manufacturers within the industry.
10. Attorney’s located free through contacting the American Bar Association.

REGIONAL SPEAKER CHECKLIST - HOW TO GET THE MOST FROM YOUR SPEAKER

1. Preview speaker or ask for a recent live presentation cassette.
2. Ask for references or for names of recent sponsoring organizations.
3. Obtain biographical information and photo from speaker.
4. Advise speaker in writing (with copy to be initialed and returned) of date, time and location of function.
5. Ask speaker for a printed introduction.
6. Let speaker know your meeting theme and send information that includes approximate meeting attendance and audience mix (management, sales, males only, male and female, etc.).
7. Be sure terms of honorarium and expenses are clearly agreed upon in writing.
8. Have CFESA Headquarters review any housing contract before signing. Send written confirmation of housing accommodations (if any) and clarify how checkout is to be handled.
9. If spouse is invited, clarify if expenses are to be covered.
10. Request list of any audio/visual equipment or other items the speaker may need for a more effective presentation.
11. Check with speaker concerning transportation schedule.
12. Plan your meeting schedule so that there is a minimum risk of running late on either side of the speaker's time. Remember the speaker's time can considerably dilute a well-planned presentation.
13. Forward a recap of speaker's presentation to CFESA along with ratings and recommendations for use at other CFESA Regional Meetings.
14. If using a speaker's bureau, make certain the contract specifies that the bureau will be responsible for a replacement in the event of a cancellation.

CFESA REGIONAL LEADERS

REGION 1: NORTH WEST

Alaska, California, Colorado, Hawaii, Idaho, Montana, Nevada, Oregon, Utah, Washington & Wyoming
Canada: Alberta, British Columbia.
Australia

Juan Martinez

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REGION 2: NORTH CENTRAL

Illinois, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, South Dakota & Wisconsin
Canada: Manitoba, Saskatchewan

Mike Coker

CSI – Coker Service, Inc.
125 W North Avenue
Villa Park IL 60181
630.941.7070
ovenman@aol.com

REGION 3: SOUTH WEST

Arizona, New Mexico, Oklahoma, Texas & Mexico

Brock Coleman

Commercial Kitchen Parts & Service
1377 N Brazos
San Antonio TX 78207
210.735.2811
brock@ckps.com

REGION 4: SOUTH EAST

Alabama, Arkansas, Florida, Georgia, Louisiana, Mississippi, North Carolina, South Carolina & Tennessee

Shannon Sykes

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David Hahn

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REGION 5: EAST CENTRAL

Delaware, Indiana, Kentucky, Maryland, New Jersey, Ohio, Pennsylvania, Virginia & West Virginia

Bruce Peeling

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REGION 6: NORTH EAST

Connecticut, Maine, Massachusetts, New Hampshire, New York, Rhode Island & Vermont
Canada: Ontario, Quebec

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