



# the BottlingLine

Issue No. 343 • Fall 2021

## 2021 Schedule\*

### NAOU RTE Meeting

October 6-7

### CCBA Annual Meeting

October 13-14

### CCBA Forums

Risk & Financial  
Management - TBA

### Mainstream Calls

November 11

### CCLT Meetings

December 1-2

\*Virtual Meeting unless  
noted otherwise



## Three CCBA Board of Governors Pass the Torch

While our Membership will commemorate the retirements of Board Members, Edwin 'Cookie' Rice, Jack Pelo and Cy W. Chesterman at our upcoming CCBA meetings, we wanted to take this opportunity to acknowledge and share this milestone moment with everyone. Cookie, Cy and Jack are unique leaders that have transcended time, each responding to the needs of our system, their markets and their people in ways that reinforced the strength and range of our business.



Edwin 'Cookie' Rice

1993-2021

As Chairman Emeritus and CEO of Ozarks Coca-Cola Bottling Company, Cookie has worked in every aspect of the business over his 68 years with his Company. Yep...that's a 6 and an 8! In 1920 the Rice family became one of the original Bottlers that entered into an agreement for the right to hold the Coca-Cola franchise in perpetuity. Ozarks Coca-Cola, then known as Electric Bottling Co./ Farmer's Beverages, was purchased by Edwin Rice Sr. His son, Edwin "Cookie" Rice Jr. joined the business in 1953.

With the Rice family's leadership and direction, Ozarks Coca-Cola Bottling Co. now employs over 700 people across its expanded franchise territory in Missouri, northern Arkansas, and southeast Kansas. The company manufactures its products in a state-of-the-art facility in Springfield, MO with distribution centers located in Springfield, Joplin, Rolla, Bolivar, and West Plains, Missouri, and Lowell, Arkansas.

More than six decades have given Cookie time to learn, grow and influence The Coca-Cola Company and our beverage industry. Cookie has served on CCBA's Board of Governors for 28 years, since September 30, 1993. He also served as an Officer and ultimately

*continued page 2*

We hope you will join us for the 2021 Virtual CCBA Annual Meeting, scheduled October 13 and 14. This year's theme is **What's Next**.

In keeping with this theme, we designed an agenda that speaks to our Bottling System's future and builds on our collective learnings over the past two years. The pace of change in our environments and business is increasing and CCBA is confident the topics and speakers will exceed your expectations. **We look forward to seeing you in October!**



# Three CCBA Board of Governors Pass the Torch

(.....continued from page 1)



as President of The Coca-Cola Bottlers Association in 2009-2010. Cookie's contributions to CCBA and our Coca-Cola System resulted in his being designated by his fellow Bottlers as a Living Legend, when CCBA celebrated its 100th anniversary in 2013!

Cookie also served on the Board of Directors for the Coca-Cola Scholars Foundation, and the American Beverage Association. His retirement from the CCBA Board is effective upon the conclusion of its Fall Board meeting in September.



**Jack Pelo**  
1996-2021

Like Cookie, Jack grew up in the Coca-Cola System. He learned the business from the inside by working in the warehouse, on the bottling line, running special events and in almost every job for his family's Bottling company in Walla Walla, Washington. CCBC of Walla Walla sold to Swire Coca-Cola in 1988. After that acquisition, Jack joined Swire as the Northwest Division Manager and continued to drive growth and gain valuable industry insight. He accepted the role of Swire's President and CEO in 1996, the same year that he was elected to the Board of Governors for The Coca-Cola Bottlers' Association. Jack has been an influential advocate for his fellow Bottlers, a key member of numerous committees and projects and has played a powerful role in transforming our nation's beverage industry.

Jack served as President of The Coca-Cola Bottlers' Association in 2003-2004, and Chairman of both the American Beverage Association and The Coca-Cola Scholars Foundation. He also bears distinction as 'first-ever' Bottler Co-Chair of the System Leadership Governance Board (SLGB). Jack's leadership extends beyond our Coca-Cola system, where he serves on the Advisory Board of the Federal Reserve Board of San Francisco, and on the board of directors for Swire Cold Storage, Key Technology, Inc. and Western Container Corporation.

While Jack has already retired from his position as President and CEO of Swire Coca-Cola USA, we now reach another milestone as he officially retires from CCBA's Board of Governors. When he joined the CCBA Board of Governors 25 years ago and became President and CEO, Swire Coca-Cola USA employed approximately 1,600 people across several states. With Jack's leadership, Swire Coca-Cola USA has grown to 7,200 employees in 13 states that stretch between the Mexican and Canadian borders and from the Pacific Ocean to the plains of Nebraska.



**Cy Chesterman**  
1998-2021

Cy W. Chesterman hails from a Coca-Cola Bottling family that is currently five generations strong. Technically, the Chesterman family has been in the beverage business longer than The Coca-Cola Company! (But that's a story for another day.) Chesterman Company, based out of Sioux City, Iowa is independently owned and operated, producing and supplying quality beverages for the markets they serve since 1872.

Cy guided his family's move in 1977 to their current headquarters location in Sioux City, where they still produce, bottle, and distribute a wide variety of products across their franchise. Shortly thereafter he led the company as it began production of canned beverages,

acquired additional franchise territories in Nebraska, South Dakota, and Illinois and expanded into the bottled water business, establishing Premium Waters, Inc. Like Cookie and Jack, the years pass quickly when you love what you do. Cy's two sons Cy Jr. and Jay Chesterman have joined him in the family business, focusing on Coca-Cola, while Cy continues to run Premium Waters. Cy has participated on the CCBA Board of Governors for 23 years.

The Chesterman Company's territory includes parts of Iowa, Nebraska, and South Dakota and employees approximately 800 people.

*continued page 3*

# Three CCBA Board of Governors Pass the Torch

(.....continued from page 2)



At this time CCBA also welcomes Sally Hargis, Ozarks Coca-Cola and Rob Gehring, Swire Coca-Cola USA to its Board of Governors. Sally and Rob's election to the Board was formally confirmed at the Fall Board Meeting in September.



Sally Hargis

Sally is vice president and chairwoman for Ozarks Coca-Cola Bottling Company. As Cookie's daughter, Sally is carrying on a 100-year family legacy at Ozarks Coca-Cola. She believes that the company's focus on valuing people over profit has helped their business continue to thrive for a century and grow significantly over the past three years. Sally also serves on the CoxHealth Systems board of directors in Springfield, MO.

Rob joined Swire Coca-Cola USA in 2018 and is a veteran of the Coca-Cola system and a former Global Chief Sales Officer for The Hershey Company. At The Coca-Cola Company, Rob served

as President of the Walmart Global Team, as well as several other roles within the Coca-Cola system including Vice President of Sales in the Canadian and Western U.S. business units.

Rob will carry forward the tremendous work done by Jack over the past decades and bring his experience and knowledge to the Association.

We know you join us in thanking Cookie, Jack and Cy for their leadership and service on the CCBA Board of Governors. Each has offered a unique perspective with industry knowledge and expertise and will be missed.

We look forward to working with Sally and Rob!



Rob Gehring

## Coca-Cola Scholars Foundation Board Update



Angela D. Harrell

We are pleased to formally announce that **Angela Harrell, SVP, Chief Diversity & Corporate Responsibility Officer, Voya Financial, and President, Voya Foundation and Pamela Stewart, President, West Operations North America Operating Unit, The Coca-Cola Company** were elected to the Board of the Coca-Cola Scholars Foundation earlier this year.

Angela is also a 1991 Scholar and worked with The Coca-Cola Company for 12 years before joining Voya in 2014. Pamela has served in key leadership roles with Coca-Cola for 20 years, serves on several community boards and councils and has been the recipient of numerous national and local honors and awards.

We congratulate Angela and Pamela on this distinction!



Pamela Stewart



<<< You can learn more about The Coca-Cola Scholars Foundation's leadership by scanning the code

# Your Family Owned Business

## The Five Fundamental Building Blocks of Strong Family Businesses

By Dana Telford, The Family Business Consulting Group

Business activities are often compared to sports. The analogy is straightforward. Sporting events take place in arenas, where coaches field their best players to execute their strategies. The goal is to win. Business owners follow a similar pattern, organizing and assembling leaders and employees to charge boldly into competitive marketplaces. The goal is to make profit.

Before competing in a new sport, one must first learn the basic set of skills – the fundamentals – that are the foundation for success in the arena. When a team loses, its coaches often adjust their training and practices and refocus on the fundamentals. In American football, the fundamentals are called blocking and tackling. In baseball, fielding and hitting. In basketball, dribbling, shooting and rebounding. Without proficiency in these basics, it is hard to imagine that any team would achieve victory in the arena.

I believe there are five fundamental building blocks of family business that must be learned and consistently revisited in order to give the business the best chance for success.



### 1. Aligned Owners

Owners who are not aligned consume precious energy and resources as they try to wrestle each other into agreement. Here's an example: Two branches of a family in Latin America each owned 50% of a \$500 million manufacturing company. Annual free cash flow was \$75 million. The leaders of each branch disliked and distrusted each other, for many decades. Their most recent disagreement was about how to distribute profits. Many hours of many days for many months were spent trying to convince the other side to alter their point of view. Each time a proposal emerged and alignment seemed imminent, attorneys were called in for final document reviews. New arguments emerged, and the cycle continued for three years. The real disagreement? One branch wanted an 18% profit distribution and the other 20%, a difference of \$1.5 million. Split in half and after taxes, this amounts to less than \$400,000 per family, not including legal and consulting fees. Was it worth the time and resources expended?

A better investment of irreplaceable time and energy would be to work to reach agreement on the six essential alignment questions:

1. **Purpose:** Why are we in business together? (e.g. we believe our family business is a force for good in our community and we are its steward)
2. **Goal:** What are we trying to accomplish? (e.g. a statement of owner's alignment or becoming the best place to work in our city)
3. **Core Values and Code of Conduct:** How will we treat each other and make decisions? (e.g. guiding principles, rules of communication, calendaring meetings)
4. **Accountability:** Who is involved, what are their respective roles and responsibilities, and to whom they will be accountable for their activities?
5. **Metrics:** How will we define and measure success? (e.g. culture and employee satisfaction surveys, revenue growth, profitability, return on equity, risk, distribution, productivity)
6. **Timeline:** When will we work on becoming aligned? When will we reach alignment?

If alignment is not met within the timeline and if little to no progress has been made, a logical question to respectfully consider is whether the family is the right owner for the business. Would it not be wiser to liquidate or go through a shareholder buyout rather than continue to try to convince or coerce the other side?

### 2. Effective Board of Advisors/Directors

The evolution of board governance in family businesses is predictable. Early stage entrepreneurial companies often have what are colloquially known as rubber stamp boards. They exist on paper but don't really function as intended. As owners and businesses evolve, so do their boards. Advisory boards are often put in place prior to a transition of the business from the founder to siblings. Advisory boards might include family members and two or three non-family outsiders.

Fiduciary boards are more formalized and have a legal responsibility to protect the interests of the shareholders and ensure that the business is managed well from both a legal and financial perspective. In fact, each owner has the same fiduciary responsibility to all other owners, a point not often considered when selling or gifting shares to children or other family members.

*continued page 5*

# Your Family Owned Business

(.....continued from page 4)

The board has four primary responsibilities. **First**, to understand and protect the interests of the shareholders. **Second**, to understand the company's competitive strengths and work with management to set a strategy that leverages them. **Third**, to oversee and hold management accountable for the successful operations of the company. **Fourth**, to plan for continuity through ownership and leadership succession planning.

How well a board fulfills its responsibilities, be it advisory or fiduciary, relies on three main factors:

1) how clearly its purpose and function is defined by the shareholders, 2) how talented and engaged its directors are, and 3) how well it is led. As family businesses evolve, it is crucial for family shareholders to understand and pay close attention to establishing and maintaining an effective board. A high functioning board can provide great value to shareholders and help them to pursue an authentic, compelling vision.

### 3. Strategic Planning

In athletics, talent and hard work go a long way, but champions aren't crowned without extensive competitive knowledge. In business, enterprises start with a belief that a product or service will be valuable to someone. This belief leads to the pursuit of identifying that someone – the ideal customer. Next, business leaders must understand what key activities they can provide better than their competitors. Fusing those two pieces together – understanding where a company's strength will be most well received and valued in a service or product offering – that is where competitive advantage lies.

As an example: a client in the restaurant business knows that their strengths lie in efficiently and graciously serving more guests per day (called table turns) than their competitors. With this knowledge in hand, they make choices about how they decorate their properties, prepare their food and train their staff members. These choices are designed to help them win and keep the customers who will value them the most. As an example, they don't have televisions in their bars and restaurants. Why? The television watching customer is most often male, tends to dine and watch alone and is prone to continue watching until a sporting event is completed. He slows the cycle of operations and hinders the restaurant from leveraging its competitive advantage of higher than market table turns.

As a result, the owners and managers focus their investment of resources in developing facilities and training that appeals to the dining out female. The "date night decision maker" one might say. A customer who tends to place more value in the ambience, the subtle beauty of the décor, the graciousness of the servers and the high quality of the food.

### 4. Merit-Based Leadership

Families must find the most talented leaders to operate their businesses, regardless of their position in or connection to the family. In the fable of "The Goose and The Golden Egg," greed and a lack of critical thinking leads a countryman to destroy his unique animal. With careful thought and planning, a successful business family can avoid a similar fate. Why is the Golden Goose so valuable? It lays golden eggs. Eggs (benefits) that the family can use to provide for their needs and support them as they pursue their life's objectives. Keeping the goose healthy and strong is the most logical collective effort the family should undertake. Rather than worry about who gets to control the goose, the most important question to answer is: Who is the most talented gooseherd? (Yes that's really what it's called!)

The two most essential questions in family business succession are 1) Does any member of the next generation have the desire to lead the company? and 2) Can she or he lead as well or better than a non-family leader? If the answer to either question is "No," a non-family leader must be identified and hired. These simple questions are often forgotten in the emotion and competition that accompanies succession.

A former client is a successful entrepreneur and a world-class athlete. When he and I first got to know each other, I asked him about his children. Did they pursue sports in college like he had? Yes. Had any of them achieved athletic success to the same level as he had? No. When I asked him why he thought they had not excelled he said, "They are talented kids but they just didn't love their sport like I did. And still do. The love of the game fuels you to work harder than anyone else at turning your talent into on-the-field superiority. Desire unlocks the door for greater success. But ultimately it is your talent that opens the door and gets you into the biggest arenas."

If members of the next generation have the sincere desire to lead the family business, how can current leaders judge their abilities objectively? Based on our 25 years of advising business families, we have identified two critical elements in this process. First, the family must develop and distribute a family employment policy that defines its strong commitment to merit-based company leadership. Second, the owners must put together a focused, well-run board of directors/advisors, with family and non-family directors, and lean heavily on them as they strive to identify and hire the most talented leaders.

*continued page 6*

# Your Family Owned Business

(.....continued from page 5)

## 5. Engaged Family Governance

Most family businesses fail to transition to the next generation. From founder to siblings and siblings to cousins, the failure rate is over 65%. Why? One might guess that company leadership or strategy-related issues might be the culprit, such as lack of access to growth capital or inadequate strategic knowledge. Years of solid research from numerous credible institutions shows that, in over 60% of cases, the underlying reason for a failed transition is family dynamics and conflict. Disagreements about a vision for the future, strategies for growth, who should lead, accountabilities, compensation, shared family assets, standards for family employment, how to make decisions together and how to manage interpersonal conflict – they all create a palpable level of tension. Without appropriate governance, this tension will naturally escalate into enough turmoil that will lead family members to choose to disengage and pursue individual professional paths.

Taking the time to envision, create and maintain a system of family governance will benefit every family business. No two family governance systems should be exactly alike because no two family businesses are exactly alike. Start by identifying a team of at least three family members who share a desire to perpetuate the family business legacy. Have them pick a leader from among them. Encourage them to set a two-year calendar with half day meetings every six – eight weeks (or more often if there is more urgency). Give them the mandate to work together and with other family members to answer the six essential alignment questions identified earlier in this article (see 1. Aligned Owners), but this time from the family's perspective.

And finally, excellent governance comes down to excellent communication. Excellent communication is Clear, Respectful, Authentic, Consistent. It's arguably the single most important piece of family business success. So, CRAC the code for excellent communication.

## Execute the Game Plan

Just as in the world of competitive sports, family business owners must master and consistently practice the fundamentals if they are to remain successful. Whether you and your family are rookies in the world of governing your business or seasoned professionals; continuous improvement through practice is the key. Any family will benefit from a consistent and thorough review of these fundamental areas.

As an idea for doing so, in your next family meeting, have each participant work together to complete the following:

- Write down and create a personal priority list of the five fundamentals.
- Compare each other's priorities, explore and discuss each other's reasoning, listen to each other with a goal of understanding each other's unique perspective.
- Tally the scores and determine the collective priorities of the group.
- Take out personal calendars and, using a two-year timeline, pick one day every quarter to focus on each one of the fundamentals. Begin with priority one, end with priority five.
- Through discussion, assign one person to be accountable for each fundamental.
- Agree to the expectation that those who are accountable for each fundamental will lead the preparation for and management of the meeting.

*Articles purchased or downloaded from The Family Business Consulting Group® are designed to provide general information and are not intended to provide specific legal, accounting, tax or other professional advice. Since your individual situation may present special circumstances or complexities not addressed in this article and laws and regulations may change, you should consult your professional advisors for assistance with respect to any matter discussed in this article. The Family Business Consulting Group®, its editors and contributors shall have no responsibility for any actions or inactions made in reliance upon information contained in this article. Articles are based on experience on real family businesses. However, names and other identifying characteristics may be changed to protect privacy.*



The copyright on this article is held by The Family Business Consulting Group®. All rights reserved. Articles may be available for reprint with permission. To learn more about using articles for your publication, contact [editor@thefbcg.com](mailto:editor@thefbcg.com).

## Coke Florida Named 2021 Nintex Innovation Champion

Nintex, the global standard for process management and automation, announced 18 winners of the 2021 Nintex Solution Innovation Awards, and Coca-Cola Beverages Florida, LLC (Coke Florida) achieved top honors.



For successfully automating business processes across its departments and operating locations in the state of Florida with Nintex capabilities, Coke Florida was named 2021 Nintex Champion, the highest recognition given to a Nintex partner. By leveraging the full Nintex Process Platform for process management and automation, including process mapping, workflow automation, RPA, and more, Coke Florida has quickly mapped, managed, and optimized workflows across all of its operations improving efficiency and supporting the company's growth.

Coke Florida also implemented solutions on the Nintex Process Platform to ensure the safety and security of its employees, vendors, and customers, a critical capability during the COVID-19 pandemic.

The Coke Florida Technology and Enterprise Transformation team recognizes the value of automation in innovation and began using Nintex Workflow for Office 365 and Nintex Workflow Cloud in 2018 to integrate disparate assets and processes.



Scan the QR code to learn more about Coca-Cola Beverages Florida's digital transformation powered by Nintex >>>

## Coca-Cola Beverages Florida Names Thomas N. Benford President and Chief Operating Officer



Thomas was promoted from Executive Vice President and Chief Commercial Officer in April, as the last issue of The Bottling Line was printing! In his new role, Thomas will oversee end-to-end commercial operations including planning, customer management, field sales, product supply, risk management, sustainability, and facilities management. He joined Coke Florida in 2015, at its founding, as Vice President of Strategy and Planning.

Mr. Benford's career includes tenure with the Halliburton Company, where he served in Marketing and Development and Corporate Finance roles. Prior to Halliburton, he was an Investment Banking Analyst in the leveraged finance group at J.P. Morgan Chase. Thomas holds an MBA from Harvard Business School and undergraduate degrees in Economics and Computational and Applied Mathematics from Rice University.

**We know our Members join CCBA in congratulating Thomas!**

## "40 Under 40" in Alaska



Lessie Kincaid, VP of Sales, Coca-Cola Bottling of Alaska / The Odom Corporation, Anchorage was included in The Alaska Journal of Commerce's annual list of the 2021 Top Forty Under 40. These are the top young professionals in the state who exemplify excellence in professional and community service.

**We know you join us in congratulating Lessie on this distinctive honor!**



## A Family Legacy Continues

Ozarks Coca-Cola recently celebrated 101 years as a family-owned and operated business AND formally unveiled its multimillion-dollar headquarters expansion!



*The Ozarks family ownership with timeline of the Company history behind them*

On May 15, Ozarks Coca-Cola Company officials, employees and invited guests gathered to cut the ribbon celebrating their 432,000-square-foot expansion to the Company's location on N. Packer Road. This \$22 million expansion is located just behind the Company's existing manufacturing building with the two facilities connected by a special bridge that spans Jordan Creek. (CCBA Members may recall viewing the incredible drone footage of the facility in our previous issue of The Bottling Line.) The nearby Jordan Creek is a landmark resource and currently the focus of a multimillion-dollar revitalization project by the city of Springfield, Missouri.

Vice President and Board Chairperson Sally Hargis shared the challenge that company officials addressed when they planned their expansion. Sally explained, "We had significant manufacturing growth at the main plant, and we needed a bigger warehouse. The creek, however, was still there and had to be considered. Jordan Creek is pretty important to Springfield, and it's also going to be a big part of future economic development downtown, so we kept looking at this property and kept thinking: How are we going to make our expansion work with the creek? We then came up with the idea to convey full goods from the production line, across the creek, via an overhead connector."



*Coca-Cola North America Franchise Leadership presents a crystal Coke bottle to Cookie*

The overhead connector is designed to transport product cases across and into an area with two palletizers that automatically stack the cases. Pallets are then taken into the warehouse space to await loading onto trucks headed to Ozarks Coca-Cola's customers. The bridge itself is not designed for people or employee traffic, except for maintenance, repairs or related work on the conveyor belt that links manufacturing to storage.

The first phase of Ozarks Coca-Cola's expansion began in 2018, when the design stage for its manufacturing facility started with an \$18 million investment that focused primarily on a new blow-in molding production line. This new line offers a strategic way to manage production expenses, while increasing volume capabilities. The new warehouse has grown from the original facility's eight loading docks to forty-two (42)! President and COO Bruce Long said the warehouse expansion gave the company a chance to consolidate operations and created space for the additional production line. "It gives us the opportunity and space to produce more for other Bottlers, to operate more efficiently, and to have the room to work and to bring all of our departments under one roof," Long said.



*Cookie Rice cuts the ribbon in the new 432,000 sq ft warehouse*

The timing for this expansion was opportune, with Ozark's growing needs for storage, loading docks and production demands. The company expanded its franchise — first with the acquisition of territories in Joplin and West Plains in 2015, and an addition of a northwest Arkansas franchise in 2017. Ozarks Coca-Cola currently operates distribution centers in Springfield, Joplin, Rolla, Bolivar and West Plains in Missouri, and Lowell, Arkansas, employing over 700 people. That's quite a journey from 1920 with a Board of Directors consisting of five members!

Plans for a formal 100th anniversary celebration last year were canceled — courtesy of the COVID-19 pandemic. No cancellations this year. The family celebrated their headquarters facility grand opening with a centennial *plus* event!

*continued page 9*

## A Family Legacy Continues

(.....continued from page 8)



*The Coca-Cola Bottlers' Association is proud to commemorate Ozarks Coca-Cola 101st year as a family-operated business!*



Coca-Cola Franchise Leadership (NAOU Central Zone) with the Mayor of Springfield, Ken McClure presenting a proclamation. (Pictured l to r) - Brittany Dunlap, VP Franchise Leadership (NAOU), Christina Ruggiero, NAOU Central Zone President; Sally Hargis (Coca-Cola Ozarks); Jennifer Zinicola, Group Director, Political Strategy (NAOU); and Tom Pickert, Sr. Franchise Manager (NAOU)

Ozarks Coca-Cola, then called Electric Bottling Co./Farmer's Beverages, was purchased by Edwin Rice Sr. in 1920. His son, Edwin "Cookie" Rice Jr., joined the business in 1953 and still serves as CEO at age 90. Sally Hargis, Cookie's daughter, and Ozarks Coca-Cola's Vice President and Chairperson, introduced a fourth generation to the family business in December 2020 when she welcomed her son Gregory Hargis as General Counsel. Gregory joined the company after completing four years as a lieutenant with the U.S. Navy Judge Advocate General's Corps. Gregory also recently welcomed his first daughter in April of this year.

**The legacy of tradition, respect and purpose continues.**

Scan the codes below to visit Ozarks Coca-Cola's website that details their Centennial timeline and rich history:



Timeline



History

## Coca-Cola UNITED Announces Executive Appointments

Please join CCBA in congratulating our Coca-Cola UNITED colleagues!



Melanie Clark has been named Vice President of Corporate Marketing effective May 1, 2021. Melanie is based in Baton Rouge, Louisiana the West Region headquarters for Coca-Cola UNITED.



Tammy Stubbs has been named Director of Sustainability, effective July 1, 2021. Tammy is based in Coca-Cola UNITED's College Park, Georgia location.

Jonathan DeWaard has been named Vice President of Tax effective May 1, 2021. Jonathan is responsible for strategic tax planning, legal entity restructuring and tax-related compliance. Jonathan is based in Coca-Cola UNITED's Birmingham, Alabama headquarters.





## Ed Bryant Joins Heartland Coca-Cola

Ed Bryant has joined Heartland Coca-Cola Bottling Company, LLC as Vice President of Public Affairs and Communications. Ed will lead Heartland's government relations, stakeholder relations, media, and brand PR, and provide guidance and counsel for local community giving programs.

Mr. Bryant comes to Heartland after serving as Vice President for Stakeholder Engagement at the United Way of Greater St. Louis, where he led the agency's collective impact teams, including Ready by 21 St. Louis, East Side Aligned, and the agency's financial stability initiative teams. Mr. Bryant has served in the leadership of St. Louis' economic development organizations. He also serves on several St. Louis community boards, including the St. Louis Area Agency for Training and Employment (SLATE), the Carver Project, the Saint Charles Economic Development Council (EDC), and the Saint Charles City Human Relations Commission.

In 2020, he served on the St. of Missouri Census 2020 Complete Count Committee, the Saint Charles City Complete Count Committee, and the City of Saint Louis Complete Count Committee. He has also served on the City of St. Louis Stimulus Advisory Board that helped to develop recommendations for distributing the City of Saint Louis' American Rescue Plan Act funds.

Mr. Bryant is also a certified diversity, equity, and inclusion trainer through NCCJSTL and has experience developing DEI trainings for non-profit, corporate, and community-based organizations. He is a native of Memphis and has lived in the St. Louis region since 2000.

**We know our Members join us in welcoming Ed!**



## Coca-Cola Bottling Executives Make Progressive Grocer's 2021 Top Women in Grocery!



Progressive Grocer's 2021 Top Women in Grocery awards program recognizes the integral role women play across all segments of the North American food retail and grocery industries. This is the 15th year for the food retailing industry's longest running program recognizing and celebrating the accomplishments and contributions of thousands of women at all levels in the industry.

Top Women in Grocery showcases overall excellence and continued achievement among female professionals in the North American retail food industry. You can learn more details about this program by scanning the code >>>



**We know our Membership joins us as we say CONGRATULATIONS to our Coca-Cola Bottling Top Women in Grocery!**



**Karen Cox**  
SVP, Sales Operations, Swire  
Coca-Cola USA



**Q. Rhoneda Hyatt**  
VP, Commercial and  
Marketing, Reyes Coca-Cola  
Bottling Co.



**Roni Jansen**  
Senior Director, Walmart and  
E-Commerce, Coca-Cola  
Consolidated Inc.



**Michelle Turula**  
Account Executive-Safeway  
NorCal Division, Reyes  
Coca-Cola Bottling Co.



## Coca-Cola Consolidated Opens New Central Indiana Distribution and Warehouse Facility

The Whitestown Coca-Cola Consolidated distribution and automated warehouse facility officially opened April 19, 2021.

This new 400,000 sq. foot facility represents a \$60 million dollar investment and has the capacity to distribute over 20 million cases per year. The Whitestown facility employs more than 450 teammates and will also include vehicles from Consolidated's transportation subsidiary (Red Classic Transit), as well as a new 15,000 sq. foot fleet shop. Nearly 200 employees will continue production operations at the nearby Indianapolis plant, which has also increased its capacity, after an \$18 million investment.

Coca-Cola Consolidated acquired distribution territories and manufacturing facilities in Indiana from The Coca-Cola Company in March of 2017. Since this acquisition Consolidated has invested significantly and facilitated a series of improvements to better serve their customers and enhance distribution capabilities in the area.



You can view footage of the facility by scanning the QR code >>>



## Corinth Coca-Cola Welcomes Sean Scruggs as Senior Analyst, Revenue Growth Management

Sean Scruggs joined Corinth Coca-Cola Bottling this spring as Senior Analyst, Revenue Growth Management. Sean is a fifth-generation family member and adopted grandson of Kenneth Williams, Corinth's President & CEO. Sean joins Corinth after stints in both public and private sectors, including the Mississippi Insurance Department. Sean holds a Master of Business Administration in Finance from Mississippi College and a BA from Mississippi State University. Sean resides in Jackson, Tennessee with his wife Richie and their two children (Dagny, 4, and Byron, 2)



We know our Members join CCBA in welcoming Sean to our system and our extended Coca-Cola Bottling family!

## Timber Country Coca-Cola Signs Us Up!



This Coca-Cola sign, originally installed around the mid-1960s by LeRoy Hanna (Bruce's Dad) remained on their facility until the Hanna family completed construction of their new corporate offices last year. The sign was safely moved, preserved and was installed in August. It certainly is a beauty.

Bruce, Teresa and the Timber Country Coca-Cola folks LOVE their sign, their new building and selling Coca-Cola... and they wanted to share the love!



## Member Resources

### 2021 Spring Financial Management Forum Highlights

Last year's 2020 Financial Management Forum was the first CCBA meeting to pivot to a virtual session as Covid-19 tightened its grip on our collective travel and meeting schedules! This year, in an abundance of caution, CCBA continued with a virtual format! And, on Wednesday, June 16th, CCBA Members across our financial Bottling community joined online for the 2021 Virtual Financial Management Forum!

The meeting kicked off with comments from CCBA Executive Director, John Gould and CCBA's Chief Financial Officer, Suzy Higginbotham. John acknowledged this year's meeting sponsor Northern Trust and emphasized CCBA's goal in working with partners who provide value to CCBA Members. He highlighted Northern Trust's customized financial program for CCBA Members. This program is unique and structured to your individual business or personal needs and CCBA hopes that Members can take advantage of this valuable resource.

Suzy explained the agenda and set the tone for an informative session as she introduced Shannon Seery, an Economist with Wells Fargo Securities. Shannon offered a comprehensive overview and outlook, sharing observations with data points that provided perspective on key economic indicators, such as consumer household spending and commodity pricing, supply side challenges, inflation and how government policies can influence how we move forward.

Duane Stanford, Editor and Publisher of Beverage Digest followed Shannon to discuss "What's Next in the World of US Beverages." Duane provided an in-depth view of our industry with performance results and trends across key beverage channels. He shared a peek into consumer trends and influencing factors on distribution and innovation.

Jeff Ryan, CCBA's Senior Manager of Finance & Administration, anchored the final portion of the session by sharing a comprehensive update to the Financial Survey program, which is open to all Bottlers. The survey provides reports to Member participants which compare financial results and key business indicators against other Members of a similar size or market type while maintaining the confidentiality and anonymity of each bottler. The goal of the survey is to provide benchmarking and insights that will help to manage your business.

Jeff provided a brief background on how the survey had evolved over the past few years and the changes that are being made for more useful metrics and easier reporting. He shared a prototype of various reports and views and explained how the reports may be customized. Importantly, Jeff explained how the reports will be secured via unique codes to ensure total confidentiality.

Suzy and Jeff fielded questions on the Financial Survey and then shared some fun and helpful polling questions with our audience to engage our audience and offer useful feedback on questions, such as areas of interest for future webinar topics and where CCBA should hold its 2022 Financial Forum!

The Financial Management Forum is open to all Bottlers and even in a virtual setting, provides an excellent opportunity to discuss meaningful financial management topics, collaborate with fellow members, and industry colleagues on topics!

Scan the code to view the webinar recording and/ or check out the presentations from the session >>>  
(You will need your CCBA website password to access.)



***Special thanks to our forum sponsor!***

<<< Scan code to be taken to program website



For more information, contact Suzy Higginbotham at 678-539-2302 (shigginbotham@ccbanet.com)

## The Coca-Cola Scholars Foundation wants your territory to have a Coke Scholar this year!



The 2021 Bottler Toolkit is available to promote application for the scholarship among high school seniors in your area. **The Bottler Toolkit includes:**

- a printable PDF flyer
- a selection timeline
- a press release template
- sample social media posts
- corresponding digital assets



<<< You may also view the Toolkit resources by scanning the code to the left

In addition, through a partnership with the College Board, Coca-Cola Scholars have emailed more than 40,000 high school seniors in territories with few or no Semifinalists over the last 6 years with at least a B+ average GPA and a 1000 SAT score to increase the number of high-quality candidates from that region.



The 2021-22 application is open to high school seniors until 5 p.m. Eastern on October 31, 2021. You may find details by scanning the code to the right >>>

## Our System Comes Together to Support One Another The Coca-Cola Employee Disaster Relief Fund – Our Connection During Crisis

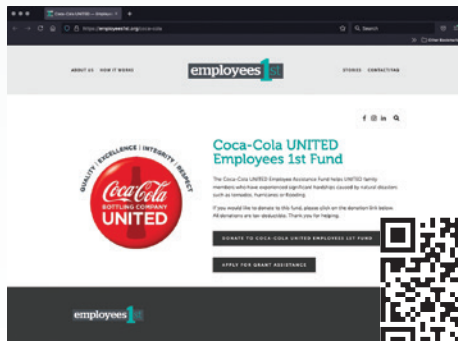
Our Coca-Cola System has a long history of supporting communities in their time of need. The Coca-Cola Employee Disaster Relief Fund was created to help System employees who are facing financial hardship immediately after a natural disaster or epidemic.

The fund relies on donations from employees, Bottlers, The Coca-Cola Company and The Coca-Cola Foundation.



<<< Scan the QR code to donate to the Coca-Cola Employee Disaster Relief Fund

To donate directly to the Coca-Cola Employee Disaster Relief Fund, you may also text CEDAF to 71777.



Coca-Cola UNITED also provides grants directly to its associates impacted by natural disasters and other hardships. Their Louisiana communities, particularly south Louisiana and greater New Orleans, were hit especially hard from Hurricane Ida.



For anyone wishing to contribute directly to the Coca Cola UNITED Employee Relief Fund, you may do so by scanning the code to the left or linking to the following address:  
<https://employees1st.org/coca-cola>

## Member Resources

### 2021 Annual Loss Control Forum Highlights

This year's virtual Spring Loss Control Forum was hosted on June 7th offering an alternative to CCBA's annual (in-person) event which typically offers a more intimate setting for Members to gather, network and interact with subject matter experts in loss control, safety and risk management specialties. The web-based meeting featured a rich and fast-paced agenda that covered some of the latest news and breakthroughs in technology innovation and application to optimize loss control, safety and risk management.

Charles Norton, CCBA's General Counsel, kicked off the meeting and reviewed the agenda. He also introduced the presenters as well as the session's technology theme and its integration across our System, on the road, in the warehouse and as wearables.



Rich Bleser, Fleet Safety Specialty Practice Group Leader, and Senior Vice President, Marsh Risk Consulting provided a comprehensive overview of advances in vehicle technology, outlining key applications and considerations when implementing some of the most popular technology. Rich shared real-life examples of how some of these technologies are working, the challenges that can be presented and considerations for implementation that our Members should review carefully in piloting or adopting into their workforce.

Mike McCartney, Director of Operations for state of Alaska with The Odom Corporation followed Rich, highlighting Odom's experiences using iWarehouse technology. Mike offered a fascinating peek into how his organization has embraced technology and the clear advantages iWarehouse has provided to their business with performance and safety metrics. He shared a simulated example of how iWarehouse works and how the application prevents damage and injury by preventing unauthorized workers to operate equipment they are not authorized to use.

A joint panel discussion followed on the topic of "Wearable Technology", led by Bobbie Schaefer, Managing Director, IoT ("Internet of Things") Innovation Lab, with The Hartford. Bobbie detailed how wearable technology can improve employee safety and mitigate worker compensation claims, and also offered guidance on how a Member might consider piloting in a facility. Wearable technology applications are being used for various ergonomics, location/employee tracking and fall detection. Bobbie was also joined by Chris Knee, (Heartland Coca-Cola) and Imran Bajwa, (Reyes Coca-Cola) who each shared their experiences in pilots they are currently implementing. Chris and Imran offered insights into managing these pilots, what they are learning, and some early practices adopted as a result of their learnings.

The final presentation offered an overview of experiences with Greenmile and Lytx, led by Erin Black and CCB Florida Team Members, Tim Brown, Manager of DOT Compliance, Sustainability and Risk Management and Rob Malloy, Sr Project Manager, Enterprise Transformation. Erin shared key data points on driver statistics that influence the need for and have been positively impacted by logistic and driver safety software applications. Erin, Tim and Rob discussed how Coke Florida employed specific capabilities within the Greenmile and Lytx technology platforms to create a safer and more efficient fleet and how they determine metrics and strategies to assess useful data across their organization.

Even virtually, participation in the annual Loss Control Forum enables Members to share and learn about new best practices being implemented in today's workforce and business environment, throughout the Coca-Cola Bottling System and beyond.

If you are interested in viewing the meeting recording or obtaining the presentations from this forum, scan the QR Code >>>

For more information, contact Charles Norton at 678-539-2304 (cnorton@ccbanet.com)



## CCBA MAINSTREAM COMMUNITY CALL – Driver Shortage and Impact on Delivery Frequency

The last two years have tested businesses across the US in ways none of us ever imagined. Individually and collectively, Bottlers of Coca-Cola have pivoted and creatively addressed the many hurdles presented to them throughout the COVID-19 pandemic.

While 2021 began with excitement and an anticipation of getting back to 'business as usual,' our understanding of 'business as usual' also continued to evolve!



The need for qualified drivers across our system is long-standing and ever-present, but has been even more critical during the last few months. To support collaboration and promote dialog on this topic, CCBA hosted a community call with Mainstream Bottling Members on June 14. Key areas of discussion focused on how Members were creating potential solutions and alternatives to address the powerful impact of recent employee and driver shortages. Dialog included newly developed hiring and retention programs & practices, driver training, operational adjustments when short on drive, implementing alternatives to CDL truck deliveries, and the importance of maintaining appropriate level of communication with key Customers as well as Coca-Cola National Retail Sales when faced with delivery challenges.

Thank you to those Members who responded to our follow up survey! Your feedback and input has helped CCBA consider enhancements and additional content and topics for future calls.



<<< Scan the code to view detailed notes from this call and contact information for Mainstream Bottling colleagues who contributed and who you might want to contact for further discussion

## In Memoriam

We know you join CCBA in sharing condolences...



**Betty Jane Hanna**

Timber Country Coca-Cola

June 15, 1928 – April 22, 2021

Betty Jane (Briggs) Hanna, passed away Thursday April 22, 2021. Betty was 92 years old. She married her lifelong sweetheart, LeRoy Hanna on June 29, 1946. Betty was a business partner with her husband for many years in the Super Y Market in Myrtle Creek, OR and Douglas County Bottling Company in Roseburg, OR.

Betty and LeRoy Hanna had seven children, Rebecca Norton, Myrtle Creek, OR; Bonnie Craig, Pleasant Hill, OR; Susan Rachor, Central Point, OR; Nancy Lou Hanna, Scio, OR; Judy Peterman, Roseburg, OR; Polly Johnson, Pendleton, OR; and Bruce Hanna, Roseburg, OR. In addition to her husband and children, Betty is survived by 21 grandchildren and 45 great-grandchildren. Betty was a wonderful wife, mother, grandmother, sister, and friend to many. Betty made this world a better place to live and she will be greatly missed. Memorial contributions can be made to **Peace at Home Advocacy Center, P.O. Box 1942, Roseburg, OR 97470, (a women's crisis center);** or **The Salvation Army, 3130 N.E. Stephens St., Roseburg, OR 97470.**

# Time to Celebrate...

Welcome new members to the Decatur, Middlesboro, Ozarks and Swire Coca-Cola families!

## Introducing...



### Hayes Louis Hargis

April 12, 2021 – 7 lbs. 10 oz.  
21.5 inches

**Proud Parents:**  
Gregory and Jourdon Hargis

**Proud Grandparents:**  
James and Sally Hargis

**Proud Great Grandfather:**  
Edwin 'Cookie' Rice



## Introducing...

### Greer Abigail Pelo

July 15, 2021 – 8 lbs. 2 oz.

**Proud Parents:**  
Kevin and Leslie Pelo

**Proud Grandparents:**  
Jack and Melinda Pelo



*Greer Abigail joins big brother Henry who will be 2 in October!*



*Ruby Hinton is named after Ruby Hinton Nash, who was the FIRST generation Decatur Coca-Cola Bottler.*

## Introducing... Ruby Hinton Davis

July 29, 2021 – 7 lbs. 2 oz.  
19 inches

**Proud Parents:**  
Luke and Grace Davis



## Introducing...



### Maggie Barry

August 9, 2021 – 7 lbs. 11 oz.  
20 inches

**Proud Parents:**  
Drs. Neil & Meka Barry

**Proud Aunt & Uncle:**  
Elizabeth Barry Romans and  
Scotty Romans and Jill Barry

**Proud Grandparents:**  
Dr. Neil Gordon Barry III and Jane Barry

**Proud Great Grandparents:**  
Neil Gordon Barry, Jr. and Tunie Barry



*Maggie joins her brother Neil Gordon Barry V, who turned 3 this year!*

3282 Northside Parkway, Suite 200 | Atlanta, GA 30327

All rights reserved, no part of this publication may be reproduced or used in any form without permission.

If you have stories or information about your Bottling organization or employees that you want to include in our next edition of the Bottling Line, contact Linda Peluso at the Association at 678-539-2309 or [lpeluso@ccbanet.com](mailto:lpeluso@ccbanet.com).