

Board of Directors Meeting

April 30, 2025
Boston, Massachusetts



ASSOCIATION OF
CHAMBER OF COMMERCE
EXECUTIVES

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Board of Directors Briefing Book

April 30, 2025

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ACCE Board of Directors Meeting

April 30 2025 | 8:00 a.m. EDT

Boston, Massachusetts

AGENDA

7:45 am **Breakfast & Reconnecting**

8:00 am **Welcome & Introductions**

8:20 am **President's Report**

8:35 am **Governance**

- Review and Approve Minutes from January 30, 2025 Meeting
- Consent Agenda
- Treasurer's Report
 - Financial Report
 - ACCE 2025-26 Budget
 - Investment Strategy Update
 - Audit Update & Approval
- Nominations Update 2025-26
 - Officers Slate
 - Board of Directors

9:15 am **Foundation Update**

9:20 am **FBI Update**

9:25 am **Disaster Preparedness and Response**

Communities continue to face humanitarian and disaster recovery challenges in the aftermath of devastating hurricanes and wildfires in the Southeast and Southern California. Hear about the impact of these natural disasters and how the broader chamber community is supporting economic recovery efforts.

Panelists:

Amanda Payne, *President & CEO, Amplify Clearwater*

Maria Salinas, *President & CEO, Los Angeles Area Chamber*

9:55 am **Break**

- 10:10 am** **Harnessing the Power of AI and Ethical Considerations**
McKinsey's global AI lead will share the latest innovations in AI, ethical considerations for its usage, and thoughts on the role chambers play in supporting both their own organizations and their business community in considering the pros, cons and practical applicability of today's hottest tech innovation.
- Presenter:
Robert Levin, *Senior Partner, McKinsey & Company*
- 11:00 am** **Harvard's Response to Federal Changes**
In defense of academic independence, Harvard has sued the Trump administration's decision to withhold \$2b in research funding. Hear from a key university leader on the impact of this decision on critical research being conducted at one of the world's leading universities.
- Presenter:
John H. Shaw, *Vice Provost for Research, Harvard University*
- 12:00 pm** **Lunch & Networking**
- 1:15 pm** **Fraught, Fragile, and Favorable: Why leadership matters more than ever**
The president of Babson College will lead an interactive discussion on entrepreneurial leadership in a global market.
- Presenter:
Stephen Spinelli, Jr., PhD, *President, Babson College*
- 3:00 pm** **Final Comments & Adjourn**



Board of Directors Governance Meeting Calendar

2025

January (virtual)

*Finance Committee	Jan. 29	1:30-2:30 pm EST
*Executive Committee	Jan. 29	3-5:00 pm EST
Board of Directors	Jan. 30	3-5:00 pm EST

April Boston, MA

*Finance Committee	April 23 (virtual)	1-2:30 pm EDT
*Executive Committee	April 29	2:30-4:30 pm EDT
Board Reception	April 29	6:30-8:30 pm EDT
Board of Directors	April 30	8:00 am-3:00pm EDT

July | ACCE25 Philadelphia, PA

*Finance Committee	July 16 (virtual)	1-1:45pm EDT
*Executive Committee	July 22	12:30-2:00pm EDT
Board of Directors	July 22	2:30-4:00pm EDT

October Alexandria, VA

*Finance Committee	Oct. 2 (virtual)	1-1:45pm EDT
*Executive Committee	Oct. 8	2:30-4:30 pm EDT
Board Reception	Oct. 8	6/6:30-8:15 pm EDT
Board of Directors	Oct. 9	8:00 am-3:00pm EDT

*Activities for select committee members only.
Additional committee meetings via conference call announced as needed.

ACCE Board of Directors Meeting

January 30, 2025 | 3:00 p.m. EST

Via Zoom Meeting

MINUTES

Present: Juliet Abdel, Brian Anderson, Sara Armstrong, Sara Barnett, Becky Bartoszek, James Bell, Candace Boothby, Katy Brooks, Kati Capozzi, Adrienne Cole, Omar Cuevas, Kim Dahlsten, Nikki Devitt, Bub Durkin, Natalie English, Ian Fletcher, Angela Franco, Barbara Jean Garza, Eric Godet, David Griggs, Joshua Gunn, Jaime Henning, Pammie Jimmar, Katie Kirkpatrick, B Kyle, Sandra Lombana Lindquist, Nick Masino, Steve Millard, Derek Miller, Matt Morrow, Roy Nascimento, Jodi Owczarski, Amanda Payne, Carlos Phillips, Brittany Quick-Warner, Ali Rauch, Sara Ray, Joe Reardon, Rory Ring, Keitha Robson, Jim Rooney, Maria Salinas, Mary Beth Sewald, Baiju Shah, Kevin Sheilley, Amy Shuttle, Nancy Spivey, Belinda Stenson, Cassie Stoner, Ryan Unger, Heather Valudes, Kami Welch and Samira Zimmerly

Excused: Alisha Benson, Andrew Hoan, Mark Owens and Ernest Strickland

Staff: Sheree Anne Kelly, Stacey Breslin, Will Burns, Jacqui Cook, Ryan Keedy, Karen Rose and Amy Shields

Chair Jim Rooney called the meeting to order and welcomed the group.

CEO Sheree Anne Kelly provided the president's report which included updates on strategic initiatives and the overall state of ACCE.

The board reviewed the minutes from the October 24, 2024 meeting. A motion to accept the minutes was made by B Kyle and seconded by Brittany Quick-Warner. A vote to approve the minutes was then posted electronically. *Motion carried.*

Rooney then presented the consent agenda of new ACCE members for approval since our last meeting. A list is provided in the briefing materials. A motion to approve the new members was made by Joshua Gunn, seconded by Sarah Davasher-Wisdom, then posted electronically for a vote. *Passed.*

The financial report was presented by Treasurer Maria Salinas. She noted that ACCE's cash position stands at \$4.8 million. Membership revenue is 2% higher than budget. Worth noting is this year's convention which, due to cost savings, realized a net profit of \$141,000 – more than four times the projected net. Expenses from operations are lower than budget. ACCE's net is better than budget and the foundation and FBI also have a positive net income. Sandra Lindquist made a motion to accept the financial report which was seconded by Brian Anderson. A vote was posted electronically. *Passed.*

Kelly provided an update on our investment strategy.

Audit Chair Brittany Quick-Warner shared that the annual audit is underway. The audit will be complete and presented for approval at the April board meeting.

Rooney called on nominating committee chair Carlos Phillips to provide an update on both the officer and board nominating committees. Phillips explained the required members of each committee according to ACCE's bylaws as well as the timeline for the nominations process. He noted invitations to serve on the officers nominating committees will be extended soon and that a kick-off call will be scheduled for late February or early March. The board nominating committee will begin its work after that process is complete. Another update will be shared at the spring meeting.

Foundation Chair Ian Fletcher gave an update on foundation activities.

An open discussion followed about the changing dynamics in the chamber profession.

Rooney made closing remarks. *Meeting adjourned.*

New Members for Approval through 4/30/2025

Greater La Crosse Area Chamber of Commerce
Chamber Keepers
Oshkosk Chamber of Commerce
Greater Minden Chamber
GuidedChoice / 3Nickels
Highlands Chamber of Commerce
App My Community
Greater Vancouver Chamber of Commerce
Burlington Chamber of Commerce
PR Shield
Holly Springs Chamber of Commerce
Belle Fourche Chamber of Commerce
Agile Cloud Computing
Greater Mankato Growth
Elk River Chamber of Commerce
Ashland Area Chamber of Commerce
Greater Haverhill Chamber of Commerce
Ozark Area Chamber of Commerce
ZenBusiness

Horizon upgrade

Overland Park Chamber of Commerce

**Association of Chamber of Commerce Executives
Consolidated Projects
For the Eleven Months Ending February 28, 2025**

JC-09CONSBS
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	ACCE	FBI	Foundation	Eliminations	CONS
Consolidated Balance Sheet					
ASSETS					
Cash and Cash Equivalents	2,500,435.08	372,204.80	884,949.17		3,757,589.05
Investments	1,776,656.13	61,412.78	-		1,838,068.91
Investments - 457B	392,786.37	-	-		392,786.37
Investment in Subsidiary	461,049.64	-	-		461,049.64
Accounts Receivable - General (net)	56,743.43	142,214.12	711.48		199,669.03
Accounts Receivable - Trust	99.12	276,666.64	-		276,765.76
Grant Receivable	-	-	-	-	-
Due from Related Entities	212,415.40	-	-	(212,415.40)	-
Prepaid Expenses	120,475.78	20,205.27	2,436.00		143,117.05
Prepaid Expenses - Convention	122,032.75	-	-		122,032.75
Deposits	2,950.00	2,950.00	-		5,900.00
Fixed Assets, Net	52,504.79	29,816.98	-		82,321.77
Right of Use Asset	-	-	-		-
TOTAL ASSETS	\$ 5,698,148.49	\$ 905,470.59	\$ 888,096.65	\$ (212,415.40)	\$ 7,279,300.33
LIABILITIES					
Accounts Payable & Accrued Expenses	53,850.81	(2,918.22)	-		50,932.59
Accounts Payable - Trust	-	207,500.00	-		207,500.00
457B Liability	392,786.37	-	-		392,786.37
Due to Related Entities	-	95,673.89	116,741.51	(212,415.40)	-
Deferred Dues	847,452.14	-	-		847,452.14
Deferred Other	130,665.00	69.81	476,960.88		607,695.69
Lease liability	-	-	-		-
Deferred Convention	128,228.00	-	-		128,228.00
Deferred Revenue - National Sponsors	34,846.63	-	-		34,846.63
Capital Lease Obligations	2,367.00	-	-		2,367.00
TOTAL LIABILITIES	\$ 1,590,195.95	\$ 300,325.48	\$ 593,702.39	\$ (212,415.40)	\$ 2,271,808.42
NET ASSETS					
Net Assets - Unrestricted	3,353,167.37	461,174.39	276,133.43		4,090,475.19
Net Assets - Temporarily Restricted	-	-	-		-
YTD Change in Net Assets	754,785.17	143,970.72	18,260.83		917,016.72
TOTAL NET ASSETS	4,107,952.54	605,145.11	294,394.26	-	5,007,491.91
TOTAL LIABILITIES & NET ASSETS	\$ 5,698,148.49	\$ 905,470.59	\$ 888,096.65	\$ (212,415.40)	\$ 7,279,300.33

Association of Chamber of Commerce Executives
Consolidated Statement of Activity
For the Year to Date Period Ending February 28, 2025

	February 25 YTD ACTUAL	February 25 YTD BUDGET	2024-25 Annual Budget	February 25 Actual vs. Budget YTD \$\$ Variance	February 25 Actual vs. Budget YTD % Variance
FBI					
Total FBI Revenue	1,110,970.91	1,082,583.33	1,181,000.00	28,387.58	3%
Total FBI Expense	967,000.19	1,070,376.54	1,167,683.50	(103,376.35)	(10%)
FBI Net Income	\$ 143,970.72	\$ 12,206.79	\$ 13,316.50	\$ 131,763.93	1,079%
Foundation					
Total Revenue	1,232,177.43	1,224,919.67	1,336,276.00	7,257.76	1%
Total Expense	1,213,916.60	1,189,290.67	1,297,408.00	24,625.93	2%
Foundation Net Income	\$ 18,260.83	\$ 35,629.00	\$ 38,868.00	\$ (17,368.17)	(49%)
ACCE					
Revenue					
Annual Convention	1,005,554.80	1,178,400.00	1,178,400.00	(172,845.20)	(15%)
Awards/COY Revenue	13,600.00	15,000.00	30,000.00	(1,400.00)	(9%)
Certification	18,027.33	11,000.00	11,000.00	7,027.33	63.9%
Chamber Education	87,934.25	115,600.00	184,000.00	(27,665.75)	(24%)
Chamber Executive Magazine Rev	68,560.00	116,080.00	116,080.00	(47,520.00)	(41%)
Executive Search	5,163.57	9,166.67	10,000.00	(4,003.10)	(44%)
Executive Speaking Engagement	27,775.00	22,916.67	25,000.00	4,858.33	21.2%
Membership Revenue	1,497,641.33	1,439,166.67	1,570,000.00	58,474.66	4%
Metro Cities Revenue	48,986.00	53,882.00	81,500.00	(4,896.00)	(9%)
Misc Income	17,900.63	916.67	1,000.00	16,983.96	1,853%
National Corporate Sponsors Revenue	165,273.29	192,840.00	226,007.00	(27,566.71)	(14%)
Publications & Research Revenue	8,617.19	18,791.67	20,500.00	(10,174.48)	(54%)
Total ACCE Revenue from Operations	\$ 2,965,033.39	\$ 3,173,760.33	\$ 3,453,487.00	\$ (208,726.94)	(7%)
Expense					
Admin (Operations, Occupancy, Governance)	340,057.48	393,983.33	429,800.00	(53,925.85)	(14%)
Admin Personnel Costs	549,809.80	600,687.08	655,295.00	(50,877.28)	(8%)
Annual Convention	863,607.13	1,147,299.00	1,147,299.00	(283,691.87)	(25%)
Awards/COY Expense	43,395.21	43,500.00	46,064.00	(104.79)	(0.2%)
Certifications Expense	22,795.25	23,870.38	30,111.00	(1,075.13)	(5%)
Chamber Education Expense	157,810.42	157,470.00	217,761.00	340.42	0.2%
Chamber Executive Magazine Expense	44,260.37	52,528.00	52,528.00	(8,267.63)	(16%)
AskACCE	27,568.99	41,194.08	44,939.00	(13,625.09)	(33%)
Membership Expense	353,164.74	428,282.25	467,217.00	(75,117.51)	(18%)
Metro Cities Expense	35,770.05	36,857.95	45,267.00	(1,087.90)	(3%)
National Corporate Sponsors Expense	73,786.83	158,218.50	172,602.00	(84,431.67)	(53%)
Publications & Research Expense	64,660.54	69,023.17	75,298.00	(4,362.63)	(6%)
Web Expense	34,530.58	45,039.50	49,134.00	(10,508.92)	(23%)
Total ACCE Expense from Operations	\$ 2,611,217.39	\$ 3,197,953.24	\$ 3,433,315.00	\$ (586,735.85)	(18%)
ACCE Net Income from Operations	\$ 353,816.00	\$ (24,192.91)	\$ 20,172.00	\$ 378,008.91	(1,562%)
Total ACCE & Affiliates Revenue	5,308,181.73	5,481,263.33	5,970,763.00	(173,081.60)	(3%)
Total ACCE & Affiliates Expenses	4,792,134.18	5,457,620.45	5,898,406.50	(665,486.27)	(12%)
Total ACCE & Affiliates Net Income	\$ 516,047.55	\$ 23,642.88	\$ 72,356.50	\$ 492,404.67	2,083%
Realized & Unrealized Gain/Loss from Invest	\$ 73,170.21				
Employee Retention Credit Revenue	477,388.13				
Employee Retention Credit Expenses - (102)	7,256.96				
Balance for ERC	\$ 470,131.17				
	Actual	Budget			
Original Opportunity Fund Allocation	600,000.00	600,000.00			
Board approved adding \$150,000 (Apr 24) to rec	150,000.00	150,000.00			
Accrued Interest	12,636.17				
Opportunity Fund Allocation	\$ 762,636.17	\$ 750,000.00			
Immigration Initiative Expense		400,000.00			
Horizon 2.0 Expense- d571	98,694.37	87,750.00			
Public Opinion Poll Expense- d572	36,500.00	45,000.00			
Finance/ Accounting System (Sage Intacct) D105	7,137.84	50,000.00			
Total Budgeted Expenses from Investments	\$ 142,332.21	\$ 582,750.00			
Balance Remaining in Opportunity Fund	\$ 620,303.96	\$ 167,250.00			
ACCE Total Change in Net Assets	\$ 754,785.17				



ACCE Finance Report

February 28, 2025, Financial Statements (11 months into the FY)

Balance Sheet

Included in the Cash and Cash Equivalents line item on the Balance Sheet are two separate accounts:

- **Operating Checking Account** – This account is used to pay regular operating expenses. The operating account should have a minimum of 5 months of essential operating capital. As of February, the current balance in this account is \$1.7 million, which exceeds that target goal.
- **Cash Reserve Fund** – Created in April 2023 with \$600,000 of seed money, this fund is in a liquid interest-bearing money market account. This account is to be accessed for short-term unplanned expenses or investment opportunities and is not managed or monitored by our investment advisor(s). In April 2024, the Finance Committee added an additional \$150k to this account. The current balance remaining in this account as of February 2025 is \$620,304 due to distributions from the account for expenses related to (Horizon 2.0, Public Opinion Poll, and Sage Intacct Accounting System).

In addition, we currently have \$1.7 million in short-term/long-term investments. Accounts Payable/Accrued Expenses has a balance of \$54k, which is related to expenses for Metro Cities meetings and accrued employee benefits. Total net assets stand at \$5 million.

Consolidated Statement of Activity

Certification Revenue – This line item is significantly over budget because of our large CCE class – 2.5 times more applicants than last year.

Chamber Education Revenue – This line item is under budget because we budgeted for a NextGen leadership program to start this fiscal year but opted to move it to the next fiscal year.

Chamber Executive Magazine Revenue – This line item is lower than budget due to fewer National Corporate Sponsors than expected, as well as not achieving the \$20k target for stand-alone sponsored content opportunities. Following staff transition, the new vice president has been off to a strong start building and strengthening partner relationships and has recalibrated expectations for the next fiscal year.

Membership Revenue – This line item is 4% higher than the budget. This is primarily due to aggressive work on collections and sales efforts, as well as new automated member touchpoints.

Miscellaneous Income – Included in this line item is interest from ACCE’s bank accounts and revenue from consulting fees for speaking engagements and board strategic planning retreats.

National Corporate Sponsors Revenue – This line item is below budget. In addition to the loss of a major partner, META, we had a vacancy in our VP, Partnership position for the first 5 months of our fiscal year. We have since brought on a new senior team member who has revamped our process and is growing both our prospect pipeline and expanding partner packages. While we anticipate falling short of our budget in this line item, we continue to grow partnerships. Likewise, the team will make up revenue shortfall in this area through other segments of the organization.

Convention – We recognized a net profit of approximately \$141K, more than four times the budgeted net revenue.

ACCE Expenses from Operations – Expenses for the first eleven months of the fiscal year are lower than the budget. This is primarily due to an effort to control spending.

Net Income – Eleven months into the year, the ACCE’s net income exceeds the budget. The Foundation and FBI (both of which have their own governing boards) also have a positive net income.

Cash Flow – The cash flow as of February 2025 is provided below:



Please note that select dips in our cash flow statement correlate to board decisions to invest funding in our reserve accounts.

2025-2026 Consolidated Budget & Variance Analysis

	2025-2026 Budget Proposal		2024-2025 Budget		Variance Analysis (2025-2026 vs. 2024-2025) (\$)		Variance Analysis (2025-2026 vs. 2024-2025) (%)
FBI							
Total FBI Revenue	\$ 1,286,252.00	\$	1,181,000.00	\$	105,252.00		8.91%
Total FBI Expense	\$ 1,219,763.07	\$	1,167,683.50	\$	52,079.57		4.46%
FBI Net Income	\$ 66,488.93	\$	13,316.50	\$	53,172.43		399.30%
Foundation							
Total Revenue	\$ 1,150,847.00	\$	1,336,276.00	\$	(185,429.00)		(13.88%)
Total Expense	\$ 1,149,869.00	\$	1,297,408.00	\$	(147,539.00)		(11.37%)
Foundation Net Income	\$ 978.00	\$	38,868.00	\$	(37,890.00)		(97.48%)
ACCE							
Revenue							
Annual Convention	\$ 1,115,500.00	\$	1,178,400.00	\$	(62,900.00)		(5.34%)
Awards/COY Revenue	\$ 33,450.00	\$	30,000.00	\$	3,450.00		11.50%
Certification	\$ 15,750.00	\$	11,000.00	\$	4,750.00		43.18%
Chamber Education	\$ 282,500.00	\$	184,000.00	\$	98,500.00		53.53%
Chamber Executive Magazine Rev	\$ 80,510.00	\$	116,080.00	\$	(35,570.00)		(30.64%)
Executive Search	\$ 5,000.00	\$	10,000.00	\$	(5,000.00)		(50.00%)
Executive Speaking Engagement	\$ 25,000.00	\$	25,000.00	\$	-		-
Membership Revenue	\$ 1,594,000.00	\$	1,570,000.00	\$	24,000.00		1.53%
Metro Cities Revenue	\$ 77,070.00	\$	81,500.00	\$	(4,430.00)		(5.44%)
Misc Income	\$ 25,000.00	\$	1,000.00	\$	24,000.00		2,400.00%
National Corporate Sponsors Revenue	\$ 205,480.00	\$	226,007.00	\$	(20,527.00)		(9.08%)
Publications & Research Revenue	\$ 20,000.00	\$	20,500.00	\$	(500.00)		(2.44%)
Total ACCE Revenue from Operations	\$ 3,479,260.00	\$	3,453,487.00	\$	25,773.00		0.75%
Expense							
Admin (Operations, Occupancy, Governance)	\$ 387,565.40	\$	429,800.00	\$	(42,234.60)		(9.83%)
Admin Personnel Costs	\$ 660,113.11	\$	655,295.00	\$	4,818.11		0.74%
Annual Convention	\$ 1,070,918.46	\$	1,147,299.00	\$	(76,380.54)		(6.66%)
Awards/COY Expense	\$ 50,035.28	\$	46,064.00	\$	3,971.28		8.62%
Certifications Expense	\$ 27,806.15	\$	30,111.00	\$	(2,304.85)		(7.65%)
Chamber Education Expense	\$ 259,814.58	\$	217,761.00	\$	42,053.58		19.31%
Chamber Executive Magazine Expense	\$ 60,421.56	\$	52,528.00	\$	7,893.56		15.03%
AskACCE	\$ 51,698.07	\$	44,939.00	\$	6,759.07		15.04%
Membership Expense	\$ 489,101.99	\$	467,217.00	\$	21,884.99		4.68%
Metro Cities Expense	\$ 59,939.71	\$	45,267.00	\$	14,672.71		32.41%
National Corporate Sponsors Expense	\$ 238,081.52	\$	172,602.00	\$	65,479.52		37.94%
Publications & Research Expense	\$ 61,864.20	\$	75,298.00	\$	(13,433.80)		(17.84%)
Web Expense	\$ 61,157.21	\$	49,134.00	\$	12,023.21		24.47%
Total ACCE Expense from Operations	\$ 3,478,517.24	\$	3,433,315.00	\$	45,202.24		1.32%
ACCE Net Income from Operations	\$ 742.76	\$	20,172.00	\$	(19,429.24)		(96.32%)
Total ACCE & Affiliates Revenue	\$ 5,916,359.00	\$	5,970,763.00	\$	(54,404.00)		(0.91%)
Total ACCE & Affiliates Expenses	\$ 5,848,149.31	\$	5,898,406.50	\$	(50,257.19)		(0.85%)
Total ACCE & Affiliates Net Income	\$ 68,209.69	\$	72,356.50	\$	(4,146.81)		(5.73%)

TO: Finance & Executive Committees

FROM: Jacqui Cook, CFO

DATE: April 23, 2025

RE: 2025-26 Budget

Overall Budget Highlights

ACCE approached this budget from a solid financial position, and the organization continues to have a strong cash position. We're proposing a budget for next year that is reflective of the economic uncertainty that may impact our members and investors but still supports growth in selective segments of our work. Additionally, this budget incorporates continued investment in the association and our strategic plan efforts. We are launching new programs and resources for members, enhancing our cybersecurity efforts and advancing tech upgrades to support members and staff. As such this budget as outlined is conservative, and structured to allow the team to be nimble should economic shifts impact revenue, and we are positioned to scale expenses accordingly.

In reviewing this draft budget, ACCE's consolidated operations are projected to have a positive net income of \$68,209. FBI is budgeting a net surplus of \$66,488. ACCEF is budgeted to have a net surplus of \$978 while ACCE has a projected surplus of \$742. As a reminder, FBI and ACCEF have their own boards which are responsible for financial oversight and budget approval.

Let's look at a few specifics for the coming year:

Annual Convention – Convention is being held in Philadelphia July 22 –25. We are budgeting for growth in registration revenue for this year's annual convention. We have kept the price of registration flat to entice continued engagement and anticipate similar attendance to last year. The revenue increase is primarily due to a more robust closing party with a separate admission price. We also plan for increased expenses due to rising speaker fees, facility costs, F&B and A/V requirements. While we do not expect the same net gain from last year, we are budgeting a \$44k net.

Chamber Education – Revenue will be higher for online learning because we are developing several new educational programs in addition to releasing new content for the Certificate in Chamber Management, which will drive supplemental revenue for this product. Additionally, we are launching a new leadership development program, generating revenue from that initiative. Our in-person regional programs have increased their scope, and we anticipate continued strong attendance for those events as well.

Chamber Executive Magazine Revenue – The 2025-2026 budget is lower than the 2024-2025 budget, but more in line with our actuals from last year. A portion of ACCE sponsor dollars are allocated to the magazine for advertising allocations. The previous year's budget was created by a former team member who anticipated a new revenue stream of \$20k for stand-alone sponsored content opportunities. That staff member left early in the fiscal year, and we realized those were unrealistic expectations. This budget line has been right sized for the market and reflective of our sponsorship goals for the year.

Membership Revenue – The budget for our 2025-26 fiscal year will remain mostly flat. This decision was made after careful consideration of several key factors including:

- Implementation of our new dues audit and revised dues model. As with most dues' adjustments, we anticipate a small amount of member attrition in the first year of implementation; that not all

- members will adjust to their dues level to the full amount in the first year; and full benefits of the new model won't be realized for another 1-2 years
- The conservative approach to this budget line is also reflective of the economic uncertainty faced by our members impacting membership recruitment.

We will continue to benchmark ourselves against a 90% retention rate and ensure that we maintain high levels of member satisfaction and engagement.

This budget's expenses also reflect having a full team for the entire fiscal year.

Admin (Operations, Occupancy, Governance) – The 2025-26 budget is lower than the 2024-25 budget. This is primarily due to lower expenses associated with ACCE's new office space, new storage facility and other infrastructure.

National Corporate Partners – While our national partners revenue is down compared to the 2024-25 budget projections, it is important to highlight that this revenue represents almost a 18% increase over the actual figures from 2024-25. This growth is a positive indicator of our ongoing efforts to strengthen relationships with our corporate partners and enhance our corporate partner value proposition. Additionally, we are now absorbing a significant increase in expenses due to having a full team in place for the entire year. This investment in our team is crucial for executing our strategic initiatives and will enable us to operate more efficiently and effectively, ultimately benefiting our national partners and the organization.

We recognize the importance of setting realistic budget goals to ensure future successes. By aligning our budget expectations with current economic conditions and organizational capabilities, we can better manage resources and mitigate risks. This approach will help us maintain financial stability and continue to provide value to our national partners.

Additional Budget Items Not in the Consolidated Budget – ACCE has built several funds outside of our operating account to allow the association to invest in efforts and resources on behalf of the industry. We are submitting a request to fund one item through these strategic investment vehicles, as well as reinvestment of capital into our reserves. As a reminder, the investment and reserve funds we're referencing are:

- *Opportunity Fund*: Created in April 2023 with \$600,000 of seed money, this fund is in a liquid interest-bearing money market account. This account is to be accessed for short-term unplanned expenses or investment opportunities and is not managed or monitored by our investment advisor(s). In April 2024, the Finance Committee added an additional \$150k to this account. The current balance remaining in this account as of February 2025 is \$620,304 due to pre-approved distributions from the account for expenses related to Horizon 2.0, the Public Opinion Poll, and Sage Intacct Accounting System.
 - *Reserve Funds*: Our reserves are structured in a conservative 70/30 split, with 70% in short-term fixed income investments including CDs and liquid interest-bearing money market accounts. 30% of these reserves are in market investments and equities.
- I. We have requested \$70,000 of the opportunity fund to invest in a new Learning Management System (LMS). This request was approved by both the Finance and Executive Committees. At the time that ACCE purchased its current system, we went with the best platform we could afford at the time. We've significantly grown our online learning options, and over time have found that there are opportunities we can't take advantage of with our existing technology. This platform is not as user-friendly as we would like for our members. We would also benefit from additional functionality to enhance our offerings. Finally, our current platform makes it impossible to offer our online trainings to non-members at a higher rate, expanding our reach and revenue potential. The new platform would eliminate these barriers and provide a better user experience.

- II. In addition, we would like to request money from ACCE's current cash flow be reinvested back into our reserve funds. Our financial policy states that we should have a minimum of 5 months of essential operating capital in our checking account. Given financial uncertainty, we'd like to keep a bit more cash in the account than the minimum.

ACCE's current cash account has more than \$1.7 million. We've requested \$400k from this account. Per our finance policy, we had unanimous approval of the Finance Committee to reinvest these funds. They will be reinvested in the following manner:

1. \$100k be added to the opportunity fund
2. \$300k be added to our reserves account with the current policy split of 70% CDs and 30% stocks, unless our financial advisor suggests another investment strategy.

This would leave more than \$1.3 million in our cash/checking account, which is more than 7 months of essential operating capital.

Professional Development Programs

Amy Shields, Vice President Programs

April 2025

Division Updates

Communications Division: In February, the division held a joint meeting with the Membership Development Division on ambassador/influencer programs. Additionally, the division sent its first newsletter on April 4 with plans to send one every other month.

Economic Mobility and Opportunity Division: The division meets every other month on the third Tuesday. Recent discussion topics covered include executive orders, adapting DEI work and workplace cultures. Future joint calls with the Membership Development Division will highlight how to embed inclusion into chamber goals and meet the needs of diverse, small business members.

Education and Talent Development Division: In Q1, the division met to review strategies for rural economic mobility, supporting apprenticeships and collaborating with health departments. ACCE hosted roundtables for chambers interested in smart justice and skills-based hiring.

Economic and Community Development Division: The division held calls discussing current economic instability, retail incubators and working with public health departments. New eCourses on [understanding public workforce data](#) and [building consensus](#) were released in the Spring. Future programming includes webinars on student data and funding community impact initiatives. ACCE staff will be conducting focus groups with economic and community development practitioners to understand needs and tailor programming moving forward.

Finance and Operations Division: The January division call was an open roundtable. Discussion topics included metrics to include in dashboards, best practices for charts of accounts, audits vs financial reviews and succession planning. The March call was a combined call with the Economic Mobility and Opportunity Division and featured practical ways to practice civility in the workplace. The May call will kick off a series of calls with a Horizon focus.

Government Relations Division: The division continues to hold calls on the fourth Thursday of the month. The February call featured a discussion on navigating the uncertainty surrounding federal funding for transportation, research and economic development projects. The March call focused on addressing homelessness in your downtown and ideas for increasing funding for chamber political action committees.

Membership Development Division: On February 12 the division hosted a call on maximizing membership through ambassador/influencer programs. On April 2, the division hosted a call on leveraging ACCE's Public Opinion Poll to enhance engagement strategies.

Other Professional Development Programming

Sales Contest and Lifetime Sales Achievement Awards: ACCE celebrated the [winners of the 2024 Sales Contest](#) at a special awards luncheon at the 2025 Membership and Revenue Development Conference in March. Registration for the 2025 Sales Contest closed on April 4. 63 participants will compete in this year's contest. Dana Ketterling Lifetime Sales Achievement Award [applications](#) are open through June 6.

CCE Program: The 2025 CCE class is the biggest class in documented history. Many candidates who applied were



eligible for the first time because of the change to the audit requirement. The candidates submitted their essays on March 28 and will move on to the exam in May.

Webinars and E-Learning: New eCourses released this Spring cover working with media, understanding public workforce data, building consensus and crisis communication.

Chamber of the Year: Seven chambers submitted program synopses by the March 31 deadline to receive judge review and feedback. The “Application Do’s & Don’ts” webinar was held on April 3, with 24 attendees representing 20 chambers. Award [applications](#) are due May 8.

Sales Coach Program: Applications for both coaches and mentees closed on March 31. This year, the program received 19 mentee applications. The program will run from April 15 through October 15.

Certificate in Chamber Management: In 2025, 34 CCM courses have been purchased, and 27 courses have been completed. ACCE staff are working on additional courses in government relations and economic development to add to the CCM program offerings in April.

Workforce Development Fundamentals Certificate: The third iteration of the certificate program started on April 3. We are exploring additional opportunities for future webinars and certificate courses with IEDC.

ACCE Convention: [Registration is open](#) for the 2025 Convention (July 22 – 25, 2025 in Philadelphia, PA). Early bird registration end on May 15. Details on breakout sessions and keynotes can be found on the [Convention website](#). Additional session will continue to be added.

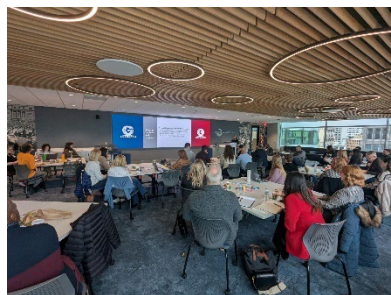
ACCE Next Generation Leadership Program: The [application](#) for this highly curated program will close April 25. The NextGen program is designed for aspiring CEOs or senior-level leaders and will include targeted professional development, mentorship, leadership training and robust networking opportunities. The program will kick off on June 11 and will include in-person programming at the Annual Convention in July.

Virtual Resources on Chamber Board Management: Staff are building out resources for chamber boards and training on how chamber leaders can work more effectively with their boards. The on-demand resources will be housed on the [Board Management](#) resources page. Current resources in development include an onboarding video to orient new board members to the chamber industry and short trainings on aligning governance with organizational goals.

Regional Conferences and Topical Convenings

Save the date for these upcoming conference in Fall 2025:

- Events and Communications Conference: October 15 – 17, 2025 in Huntsville, AL
- Economic Opportunity Leadership Visit: October 28 – 29, 2025 in Tulsa, OK
- Government Relations Meeting: November 9 – 11, 2025 in Cleveland, OH



2025 Education and Talent Convening: This event featured keynotes from experts from the Strada Education Foundation, the University of Michigan and Ascend at Aspen Institute. Keynotes focused on talent migration and multi-generational approaches to workforce development. Participants chose breakout sessions and workshops on talent attraction, workforce data basics, childcare, skills development for chamber members and more. Detroit Regional Chamber staff discussed their TalentED initiative and took participants on a tour to visit nearby education partners.

2025 Membership & Revenue Development Conference: ACCE hosted its Membership & Revenue Development Conference in Cobb County, Georgia, from March 19–21. The event sold out with 180 attendees, reflecting strong interest and engagement from the community. Sessions focused on key topics including member retention strategies, strategic non-dues revenue planning, dues increase tactics, leveraging membership for revenue growth and converting unreceptive prospects. Thank you to the Cobb Chamber for hosting the event.



Communications & Networks Report

Will Burns, Vice President – Communications & Networks

ACCE Communications





Chamber Executive: The Winter 2025 edition of *Chamber Executive* is [online](#). The issue covered the importance of CEO succession planning and introduced a new ACCE succession planning template. It also included articles on marketing tactics, a Horizon update from Sheree Anne and tips for new chamber CEOs.

- **Sales Success:** We also spoke to five membership sales professionals to gain insights into the sales process and tips for building your sales funnel.
- **The Spring 2025 issue** will be published in May. It will feature articles on member engagement trends, strategic planning, a Q&A with ACCE Horizon Investor CEOs and insights from ACCE's Operations Report.




Social Media Highlights: ACCE achieved growth on our social media channels during the last quarter.

- LinkedIn: Follower count grew by 282 | Engagement rate holds at 12%
- Facebook: Follower count grew by 66 | Impressions 23K | Engagement rate dipped to 6%
- Instagram: Follower count grew by 128 | Engagement rate steady at 5%.

Top Performing Posts - Facebook

-  Horizon 2035 Release
-  2025 Membership & Revenue Photos
-  Metro Cities Meeting Photos
-  Sheree Anne Kelly at WACE photo

Top Performing Posts - LinkedIn

-  2024 Sales Contest Winners
-  Metro Meeting Photos
-  Workforce Development Certificate Recipients

Chamber Brand Campaign: We're in the planning phase of our chamber brand campaign. The goal of the effort is to raise public awareness about the role chambers play in community prosperity, business advocacy and economic development. We also seek to empower local chambers to define their impact, tell their stories and engage more people throughout their communities. We are currently recruiting a task force comprised of chamber CEOs and staff professionals to help with planning and strategic direction. The first task force meeting will be held in May, with a goal of launching the campaign in the fall.

Research & Benchmarking

New Chamber Employee Engagement Survey: 29 ACCE member organizations representing a collective 450 staff are participating in the [2025 Employee Engagement Survey](#). This new offering is the first industry-specific endeavor to understand and transform chamber staff engagement. Survey fielding is underway with analysis and reporting to follow. For chambers that did not participate in the survey, the final report will be available for purchase beginning in June.

New Chamber Playbook on Navigating Uncertainty: History has shown us that moments of uncertainty are precisely when chamber leaders can and should focus on the future and lead with clarity and confidence. We've created a [free, members-only resource](#) to provide guidance on navigating uncharted waters, including situational assessments, issue management processes, making informed decisions in fast-paced environments and communication tactics for polarized environments.

Chamber Pulse Surveys: This quarter, ACCE released the results of our [artificial intelligence, policy and political action](#) and [software solutions surveys](#). Our next survey will cover chamber mergers and partnerships. The results of all previous pulse surveys are available [online here](#).

AskACCE: The team continues to provide Q&A and in-depth research services. From January through March 2025, we responded to 104 [AskACCE requests](#). Satisfaction ratings averaged 5.0/5.0. Inquiries focused on:

- **Benchmarking:** Operations survey questions, Chamber of the Year qualification criteria, salary benchmarking reports
- **Governance:** Sample bylaws for chambers and chamber boards, board member orientation resources, new member approval processes
- **Crisis Management:** Disaster recovery, crisis communications and issues management plans; chamber responses to ICE activities

Dynamic Chamber Benchmarking: 310 members participated in the FY2024 Operations Survey this year, including 90% of ACCE's Board of Directors. The results of this survey are now open in Dynamic Chamber Benchmarking. The next operations benchmarking publication will be available for purchase by early May.



The FY2024 Salary Survey is due by **May 23**. **All board members are expected to complete** both the operations and salary surveys. More information, including our new [playlist of instructional videos](#) can be found [online here](#).

Customized Research & Special Publications: ACCE can conduct customized projects to elicit data and feedback from select chambers on quantitative (and even qualitative) questions to benchmark how your peers manage operations, fundraising, employee engagement and more. For a reasonable fee, our team can conduct:

- CEO executive compensation reports.
- More detailed benchmarking to compare your chamber to your most relevant peers.
- Programmatic audits to compare your program of work to similar sized chambers.
- Membership dues model comparisons.

Contact [Will Burns](#) for more information.

Community Peer Groups

Metro Cities Council: ACCE's Metro Cities Council met in Orlando. The group will meet in person on February 19-21 in Orlando, Florida, hosted by the Orlando February 19-21. The agenda covered topics including navigating political fragmentation, technology transformation, regional mobility and how metro regions are adapting to the Trump Administration.



Major Cities Council: ACCE's Major Cities Council met in Wilmington, North Carolina on March 2-4. The meeting covered talent attraction and retention, how chambers are using artificial intelligence, public-private partnerships and how chambers are adapting to the Trump Administration.



Emerging Cities Council: Emerging Cities Council continues to meet quarterly. Its March call focused on the impact of federal government uncertainty and chamber membership trends. The council's Google Group remains a valuable resource for ideas and information-sharing among members. Topics of recent online discussions include chamber foundations, leadership programs and chamber-operated job boards.

Hometown Chamber Council: The Hometown Chamber Council's March call focused on modern communications trends for chambers. The council's Google Group remains a valuable resource for information-sharing among members. Recent threads focused on board meeting agendas and travel policies.

Member Engagement & Partnerships

Ryan Keedy, VP Partnerships & Member Experience
April 2025

ACCE Membership

We are currently outpacing our revenue retention goal (93% vs 90% budgeted) and pairing that with strong new membership, especially at our Horizon Investor level - nine new members in the past year - we are finishing the year off strong.

- The dues audit and new membership dues schedule have both launched, and early feedback is primarily positive. We continue to listen and work with chambers to get right sized over the course of 2-3 years.
- We've had several inquiries concerning the new Pathfinder membership option. This is the new digital-only membership for micro chambers. We anticipate more interest in the coming weeks following our first online campaign.
- We participated in the Western Association of Chamber Executives (WACE) as a sponsor/exhibitor and made great connections with prospective members and partners.
- We are participating in the MAKO Annual Conference as exhibitors at the end of April.

ACCE Partners & Sponsors

We completed the reimagining of the Partner and Sponsor offerings, including corresponding collateral and web assets. The response from current partners and sponsors has been overwhelmingly positive.

ACCE Partners

- We had a strong ending to Q4 with the addition of RoleCall as our newest Industry Partner.
- The Q1 2025 renewals are off to a strong start, with seven partner renewals already confirmed (we have one outstanding renewal that we anticipate confirming shortly).
- There are several strong potential partners in the pipeline.

ACCE Convention

- The convention sponsorships are off to a good start, recently securing a large commitment from Comcast to be the exclusive Presenting Sponsor for the event.
- We currently have a number of commitments from organizations to exhibit at convention, with a strong prospect funnel.

Regional Sponsorships

- In March we exceeded our budgeted revenue for both the Membership & Revenue Development Conference and our Education & Talent gathering.
- We already have a solid pipeline of interest in our Events & Communication Conference in the fall and anticipate being able to achieve our budget revenue.

ACCE Foundation Updates

Amy Shields, Executive Director

April 2025

Programmatic Work

ACCE Foundation's Education and Talent Development Fellowship: Staff are kicking off the planning process for the next round of our Fellowship program. We plan to announce the next opportunity by late summer.

Equitable Credential Attainment Cohort Program: This quarter, communities focused on finding additional funding and post-grant plans. Staff continue to meet with communities every other month to provide technical assistance and coaching. The current cohort of the program will end in July 2025. Staff presented at AACC's Workforce Development Institute on the Foundation's equitable credential attainment cohort.

Rural Workforce Development: The Foundation released a [toolkit](#) to support other rural chambers in replicating the work of the Economic Mobility for Rural Workers cohort. The Foundation hosted a webinar on January 30 highlighting two members of the cohort. This grant goes through summer 2025 and is funded by Ascendium Education Philanthropy.

Smart Justice: The ACCE Foundation's Smart Justice Roundtable meeting quarterly. The March call focused on bonds and incentives for hiring formerly incarcerated individuals.

Skills-Based Hiring: From March - April, the Foundation coached a small cohort of small and mid-sized businesses on implementing skills-based hiring practices. The next Complete Skills-Based Hiring Lifecycle series starts in May. This work is funded by the Rework America Alliance, an initiative of Jobs for the Future.

Public Health: The Foundation recently facilitated two webinars on how chambers and public health departments can work better together. Staff are also co-facilitating a community of practice on public-private partnerships to improve community health.

Development Pipeline and Partner Cultivation

Higher Education and Workforce Development

- Secured a follow-on meeting with JPMC to discuss the role chambers play in building postsecondary-employer partnerships
- Submitted a \$800K follow-on grant to the Kresge Foundation to continue supporting work on higher education ecosystems
- Meeting with Ascendium Education Philanthropy to discuss the next phase of the Economic Mobility for Rural Workers work and a potential grant to inform higher education programs offered in jails and prisons
- Submitted a \$275K concept to Truist Foundation on providing career pathways technical assistance
- Working on a follow-on concept for Lumina Foundation to explore opportunities for chambers and the business community to better inform credentials and degrees of value
- Finalizing a sponsorship from Strada Education Foundation
- Developing a proposal for ECMC to offer workshops on building partnerships across higher education and business

Other

- Responded to an open call for proposals from the Michael and Susan Dell Foundation to support the creation of in-demand career pathways

- Secured chamber and ACCE speakers for a two-part series on the *Apprenticeship 2.0* podcast to share insights on how chambers support and engage in work-based learning in their regions
- Met with FordNGL on possibilities for expanding participation of chambers in academies
- Secured a \$25K grant from the deBeaumont Foundation to co-facilitate a community of practice on public/private partnerships for public health

Candace Boothby, CCE, APR, GCCE, IOM, Chair
Roy Nascimento, CCE, IOM, Co-chair
Fringe Benefits, Inc.
April 2025

The benefits team is halfway through with compliance season for the 401k plan. The changes we made to the annual 401k reviews for participating employer plans have been well received at the plan administrator level. In addition, we believe improvements to our plan review process will result in a higher level of accuracy for each plan upon completion. We are still targeting a June 30 completion.

The second key item in 401k compliance season is the 410k plan audit. The team began working with the employers selected as part of the 2024 randomly selected sample population in early February. Currently we are on schedule for the audit to be wrapped up for filing of the Form 5500 by July 31, 2025.

We are excited to share that insurance administration is going online! Going forward, insurance plan administrators will be able to make changes to the organization benefits, enroll new employees, and make changes to existing enrollments through the ACCE Member Portal. This will lead to a better user experience for plan administrators and employees. This will also provide better protection of employee data and in time may create efficiencies for the benefits team. A soft rollout began mid-April in anticipation of being fully live May 1.

The cybersecurity audit for FBI in regard to the 401k plan services is almost complete. These cybersecurity audits are a new responsibility for retirement plans sponsors resulting from Department of Labor guidance issued in 2022. Progress updates will be presented to the Benefits Trust at their May 2025 meeting.

ACCE External Affairs Engagement

As the national association serving and representing the chamber community, it's critical that ACCE staff spend time embedded in the field. This takes the form of chamber visits for strategic guidance and idea-sharing, speaking and facilitation opportunities, attending broad-based events highlighting issues that impact chambers and the constituents they serve, and outreach to other stakeholders, including but not limited to: media; national associations; universities, etc. This list does not include events hosted by or at ACCE:

ACCE Staffer	Date	Event	Location	Description
Sheree Anne Kelly	Oct. '24	AZ Chamber Execs	Mesa, AZ	Keynote speaker at annual conference
Sheree Anne Kelly	Oct. '24	ASAE Academy	Virtual	Building a Resilient and Future-Ready Workforce
Sheree Anne Kelly	Oct. '24	National Beer Wholesalers Association	Alexandria, VA	Met with president & CEO to connect around current initiatives
Sheree Anne Kelly	Oct. '24	National Assoc. of Workforce Boards & IEDC	Washington, DC	Met with CEOs to connect around current initiatives
Sheree Anne Kelly	Oct. '24	Eurochambres	Meeting	Met with president & CEO to connect around current initiatives
Sheree Anne Kelly	Oct. '24	Harvard Business Review	Virtual	Future of Business 2024
Sheree Anne Kelly	Oct. '24	Greater Spokane Inc.	Spokane, WA	Keynote speaker at Leadership Advisory Council; GSI staff & senior team presentations; keynote speaker at regional chamber event
Sheree Anne Kelly	Oct. '24	Montgomery County Chamber board meeting	Rockville, MD	Presented on the trends and best practices in the industry
Will Burns	Oct. '24	American Immigration Council	Columbus, OH	Attendee
Amy Shields	Oct '24	Glenwood Springs Chamber board meeting	Virtual	Presented on chamber foundation trends
Amy Shields	Oct '24	USCC, IOM Board Meeting	Washington, DC	Curriculum Committee, Board of Trustees and DEI Committee meetings
Amy Shields	Oct '24	Business-Higher Education Forum Meeting	Washington, DC	Connect with business and higher education executives
Amy Shields	Oct '24	Workforce Ecosystem Collaborative Kick-off	Virtual	Meeting with other adult education and workforce partners to identify trends and issues
Amy Shields	Oct '24	Opportunity@Work	Virtual	Discuss skills-based hiring and alignment in work
Rumsha Ahmed	Oct '24	CAEL Conference	New Orleans, LA	Presented on Designing a Regional Talent Strategy for Economic Mobility

Rumsha Ahmed	Oct '24	High school career fair	Aldie, VA	Presented on communication skills and chamber/ association jobs
Karen Rose	Oct. '24	ASAE Business Solutions	Virtual	Attendee for webinar: An Ever-Evolving Boardroom: Examining the State of Association Governance
Amy Shields	Oct '24	CAEL Strategic Planning	Virtual	Provided input on CAEL's strategies for working with chambers
Sheree Anne Kelly & Amy Shields	Nov '24	NACo collaboration meeting	Washington, DC	Met to discuss alignment of work and potential future joint programming
Sheree Anne Kelly & Amy Shields	Nov '24	WACE	Alexandria, VA	Met with president & CEO to discuss current initiatives and potential partnerships
Sheree Anne Kelly	Nov '24	IEDC	Washington, DC	Met with president & CEO to discuss continued partnership opportunities
Sheree Anne Kelly	Nov '24	National Assoc. of Workforce Boards	Podcast guest	Workforce Central Podcast
Sheree Anne Kelly	Nov '24	ASAE	Webinar	Tomorrow's Workforce Coalition: General Election Recap Webinar
Sheree Anne Kelly	Nov '24	Bend Chamber of Commerce	Bend, OR	Keynote speaker at annual Impact Conference
Amy Shields	Nov '24	Washington Chamber of Commerce Executives Exec2Exec webinar	Virtual	Presented on public opinion poll results & Horizon preview
Amy Shields	Nov '24	Carolinas Association of Chamber of Commerce Executives conference	Blowing Rock, NC	Keynote on public opinion poll results & Horizon preview
Emma Griffin	Nov '24	AMS Fest	Washington, DC	Attended meeting for association technology
Sheree Anne Kelly	Dec '24	Bastrop Chamber	Bastrop, TX	Keynote speaker at annual luncheon
Sheree Anne Kelly	Dec '24	Temple Chamber of Commerce Board	Temple, TX	Facilitated strategic planning retreat
Sheree Anne Kelly	Dec '24	Greater Austin Chamber	Austin, TX	Facilitated staff retreat
Amy Shields	Dec '24	Association of Career and Technical Education Summit 7.0	San Antonio, TX	Attended convening of associations and training providers to discuss talent needs and challenges
Amy Shields	Dec '24	Glendale Chamber Board Meeting	Virtual	Presented on chamber foundations
Jen Pruden	Dec '24	FACP	Virtual	Public Opinion Poll Presentation
Sheree Anne Kelly	Jan '25	NASC Winter Meeting	Rancho Mirage, CA	Presented on public opinion poll data and Horizons update; attendee

Sheree Anne Kelly	Jan '25	ASAE / Key Assoc. Industry Committee	Washington, DC	Committee meeting and peer-led roundtable; asked to lead discussion on workforce
Sheree Anne Kelly	Jan '25	Montgomery County Chamber Execs	Rockville, MD	Presented on ACCE and Public Opinion Poll
Sheree Anne Kelly	Jan '25	Highlands Chamber of Commerce Board & Staff	Virtual	Presented on Horizon and Public Opinion Poll
Amy Shields	Jan '25	Safal Partners Apprenticeship webinar	Virtual	Presented on the role of chambers in work-based learning
Amy Shields	Jan '25	Benefits Cliff conversation	Virtual	Discussed the work of chambers in addressing the Benefits Cliff
Amy Shields	Jan '25	FordNGL discussion	Virtual	Conversation on expanding the role chambers plan in setting up career academies
Amy Shields	Jan '25	RiseKit	Virtual	Discussion on the use of technology to adopt skills-based practices
Rumsha Ahmed	Jan '25	Workforce Development Institute	Coronado, CA	Presenting on equitable credential attainment work
Amy Shields	Jan '25	Myrtle Beach Workforce Summit	Myrtle Beach, SC	Presenting on the value of skills-based hiring to chamber members
Jen Pruden	Jan '25	IACCE	Virtual	Public Opinion Poll Presentation
Sheree Anne Kelly	Feb. '25	WACE Annual Conference	Henderson, NV	Speaker – Horizon 2035 Report & Public Opinion Poll
Sheree Anne Kelly	Feb. '25	ASAE	Meeting	Call with Chief Public Policy & Governance Officer to discuss tax reform and engaging state chambers
Sheree Anne Kelly	Feb. '25	Georgetown University McDonough School of Business EmpowerHER	Virtual	Meeting with members of Georgetown University McDonough School of Business
Sheree Anne Kelly	Feb. '25	Embassy of Canada	Meeting	Discussion around tariffs with Ambassador Hillman & the Minister-Counsellor of Economic & Trade Policy
Sheree Anne Kelly	Feb. '25	IEDC Leadership Summit	Washington, DC	Panelist for Association Coalition Building – Collective Advocacy for Impact
Ryan Keedy & Lindsay Bensko	Feb. '25	WACE Annual Conference	Henderson, NV	Exhibitor
Amy Shields	Feb '25	The Conference Board	Virtual	Discussed opportunities for collaboration

Sheree Anne Kelly	Mar '25	Frisco Chamber board retreat & Business Breakfast	Frisco, TX	Facilitated strategic planning retreat and presented to business community on the future of chambers
Sheree Anne Kelly	Mar '25	CCC100 meeting	Washington, DC	Member/attendee
Sheree Anne Kelly	Mar '25	Cambridge Chamber (Ontario)	Virtual	Presented to local businesses around tariff concerns
Sheree Anne Kelly	Mar '25	eHealth, Inc.	Meeting	Met with VP Government Affairs to discuss benefit offerings for small businesses
Amy Shields & Ryan Keedy	Mar. '25	Salute To Association Excellence	Washington, DC	Networking luncheon
Amy Shields	Mar '25	Urban Institute	Virtual	Discussed opportunities to collaborate on apprenticeships
Amy Shields	Mar '25	deBeaumont Foundation	Virtual	Presented on two webinars for public health officials to discuss working with the private sector
Amy Shields	Mar '25	Covington Business Council	Virtual	Presented on chamber foundations to board
Amy Shields	Mar '25	CACCE Conference	Chapel Hill, NC	Presented on Horizon 2035
Sheree Anne Kelly	Apr '25	NAWB Forum	Washington, DC	Panelist for Driving Thriving Economies, a moderated discussion with ACCE, IEDC & NAWB leadership
Sheree Anne Kelly	Apr '25	Center for Regional Economic Competitiveness	Arlington, VA	Meeting with CEO to discuss partnership opportunities
Sheree Anne Kelly	Apr '25	ASAE CEO Roundtable	Washington, DC	Strategic Storytelling: Strengthening Awareness & Advocacy
Sheree Anne Kelly	Apr '25	IEDC	Meeting	Meeting with CEO around leadership strategies to navigate Eos/uncertainty
Sheree Anne Kelly	Apr '25	Chamber of Commerce Execs of Canada	Virtual	Presented alongside ICC; future of chambers
Sheree Anne Kelly	Apr '25	DCI	Meeting	Meeting with partner to discuss collaborating on brand campaign
Sheree Anne Kelly	Apr '25	Georgetown University McDonough School of Business EmpowerHER	Washington, DC	Panelist for Boardroom Ready: Advocating for Yourself at the Executive Level
Sheree Anne Kelly	Apr '25	Georgetown University McDonough School of Business EmpowerHER	Washington, DC	Judge for MBA Executive Challenge
Amy Shields	Apr '25	FordNGL	Alexandria, VA	Discussed opportunities for partnership

Amy Shields	Apr '25	Clayton Chamber of Commerce	Virtual	Discussed chamber foundation best practices
Kevin Jacobs	Apr. '25	MAKO Annual Conference	Branson, MO	Exhibitor

Do you know of events at which our team should speak? Conferences/virtual meetings where our industry's voice should be heard? Know a chamber that could benefit from customized consulting, training or facilitated retreats? Let us know. Tell Sheree Anne – skelly@acce.org.