

# Board of Directors Meeting

October 27, 2021  
Alexandria, Virginia



ASSOCIATION OF  
CHAMBER OF COMMERCE  
EXECUTIVES

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# **Board of Directors Briefing Book**

## **October 27, 2021**

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## ACCE Board of Directors Meeting

October 27, 2021 | 8:30 a.m. EDT

Alexandria, VA

### AGENDA

- 8:00 a.m. Breakfast and Reconnecting**
- 8:30 a.m. Welcome: Introductions and Meet the New Directors**
- 8:50 a.m. Strategic Partner Project N95: Update**
- 8:55 a.m. Governance**
- Review and Approve Minutes – July 14, 2021 Meeting
  - Consent Agenda – New Members for Approval
  - Treasurer’s Report
    - Financial Report
    - Cash Flow & Investment Strategy Update
  - FBI Governance – Annual Stockholders Meeting
- 9:10 a.m. Foundation Update**
- 9:15 a.m. President’s Report**
- State of ACCE
  - Chamber Innovation Summit 2021 & Convention 2022
  - Staff Retreat & Strategic Plan 2022
  - Spring Board Meeting 2022
- 9:30 a.m. Micro-session: Memphis Center for Economic Competitiveness**  
The Greater Memphis Chamber launched this new initiative last month that uses a data-driven approach to economic development aimed at prosperity for all.
- [Beverly Robertson](#), President & CEO, Greater Memphis Chamber
- 9:50 a.m. Break**
- 10 a.m. Managing the Future of Work**  
Hear new research from Harvard Business School on what employers nationwide need to consider in order to tackle talent challenges including how to attract, retain, and develop a workforce that meets the future needs of our communities.
- [Joseph B. Fuller](#), Professor of Management Practice, Harvard Business School

- 10:45 a.m. Micro-session: West Alabama Workforce & Community Development Center**  
While addressing local workforce needs, engaging community partners, and tackling issues that impact underserved segments of their community, the chamber also reimagined its HQ location.
- [Jim Page](#), President & CEO, The Chamber of Commerce of West Alabama
- 11:05 a.m. Break**
- 11:15 a.m. DEI Expectations from Gen-Z**  
Elected the first black student body president in Yale's 318-year history, our speaker articulates what the next generation of talent and future leaders expect from major institutions across the spectrum of inclusivity and equity.
- [Kahlil Greene](#), Yale Student Body President and online educator
- 12:00 p.m. Networking Lunch**
- 12:45 p.m. Micro-session: Racial Equity and Economic Mobility**  
The Greenville Racial Equity and Economic Mobility Commission doesn't just do great work for the region, but also showcases the power of strategic partnerships. Plus, their minority business accelerator is expanding into neighboring communities.
- [Carlos Phillips](#), President & CEO, Greenville Chamber
- 1:05 p.m. Micro-session: Holistic Workforce Initiatives**  
In addition to work on talent pipeline, opioid addiction recovery and connecting students with career pathways, the chamber also engages in fair chance hiring efforts through its Kentucky Comeback program.
- [Ashli Watts](#), President & CEO, Kentucky Chamber
- 1:25 p.m. ACCE's DEI Journey**
- 1:35 p.m. Breakout Groups**
1. Strategies to encourage and advance DEI work across more chambers
  2. What are the barriers that stand in the way of geographic chambers being more diverse? (Diversity as it relates to staff, leadership, membership...)
  3. How can we create more inclusive chamber teams and boards of directors?
- 2:00 p.m. Full Board Discussion on Chamber DEI**
- 2:30 p.m. Adjourn**

# ACCE Board of Directors Meeting

July 14, 2021 | 3:00 p.m. EDT

Virtual – Zoom Meeting

## MINUTES

Present: Juliet Abdel, Brian Anderson, Robin Anderson, Sara Armstrong, Linda Ashworth, Becky Bartoszek, Alisha Benson, Carl Blackstone, Kathy Blank, Beth Bowman, Hamad Buamim, Jay Byers, Adrian Cain, Terra Carroll, Chip Cherry, Jane Clark, Graham Cobb, Greg Durocher, Natalie English, Tiffany Esposito, Mark Fisher, Christy Gillenwater, Eric Godet, David Griggs, Joshua Gunn, Brian Hall, RaDonna Hessel, Michael Huber, Ken James, Adam Knapp, Brad Lacy, Kelle Marsalis, Matt McCormick, Sherry Menor-McNamara, Derek Miller, Rachel Morris, Matt Morrow, Jim Page, Carlos Phillips, Matt Pivarnik, Jeff Rea, Joe Reardon, James Reddish, Bob Rohrlack, Jim Rooney, David Rumbarger, Maria Salinas, Todd Sanders, Kevin Sheilley, Bill Sisson, Sharon Smoley, Vern Squier, Bryan Starr, Sherry Taylor, Tony Vedda, Allison Walden, Ashli Watts, Angie Whitcomb, Roy Williams, Sandra Wilson and Gilbert Zavala

Excused: David Brown, Kati Capozzi, Doris Carson Williams, Adrienne Cole, Dottie Gallagher, Michel Leblanc, Megan Lucas, Adam Marshall, David Prunte, Brittany Quick-Warner and Beverly Robertson

Staff: Sheree Anne Kelly, Alysia Bell, Stacey Breslin, Beth Bronder, Will Burns, Jacqui Cook, Karen Rose, Amy Shields and Anissa Starnes

Chair Jay Byers called the meeting to order and made opening remarks. He welcomed new board members and introduced each.

Byers reviewed the minutes from the April 29, 2021 board meeting. A motion to accept the minutes was presented electronically and approved by all board members present. *Motion carried.*

Byers then presented the consent agenda of new ACCE members for approval since our last meeting. A list is included in the briefing materials. A motion to approve the new members was presented electronically and approved by all directors present. *Passed.*

CEO Kelly provided an update on the status of the proposed amendments to the bylaws. She shared a summary of the comments and recommended changes from outside counsel and noted that there are additional questions from executive committee members. Kelly will review these questions with outside counsel and provide another update or the final version of amended bylaws for approval at the October board meeting.

Byers called on Treasurer Bill Sisson for the year-end financial report. He noted that our cash position is positive and strong, with more than \$3.3 million in assets and consolidated net assets totaling \$5 million. Membership revenue is above budget, partly due to deferrals from last year. Operational expenses are lower than budget due to an across-the-board moratorium on spending. Revenue from the virtual Summit far exceeded expectations and resulted in the highest participation rate of any event in the organization's history. Sponsorship/partnership support proved strong as well. Net income for ACCE, the foundation and FBI exceed budget. A motion to approve the financial report was presented electronically and approved. *Passed.*

Sisson then presented the finance report through May 31, 2021. ACCE's cash position is \$3.1 million with total net assets totaling \$3.3 million. Membership revenue is positive and expenses for the first two months of the fiscal year are below budget. A motion to approve the finance report was presented and approved electronically. *Passed.*

Sisson wrapped up his report with an update on the cash flow analysis and investment strategy plan, requested at the spring board meeting.

Byers noted that Nominating Committee Chair David Brown cannot attend today's meeting and called on committee member Sherry Menor-McNamara for an update in his absence. Menor-McNamara provided a recap of the nominations season and the make-up of the Officers Nominating Committee, thanking committee members. She shared her confidence in the line-up for the coming year and presented the slate of officers. A motion to approve the officers slate was presented electronically and approved; there were no nays. *Passed.*

Menor-McNamara moved on to the Board Nominating Committee. She acknowledged and thanked committee members and noted that the due diligence process was very thorough. A number of self-nominations were submitted and considered. The electronic ballot was sent out in early June and closed on June 15. The slate was approved by membership. Incoming directors are here today and will be presented at the virtual Summit in a few days. Departing directors will also be recognized.

Byers congratulated new officers and incoming Chair Chip Cherry.

CCE Commissioner Matt McCormick presented the 2021 class of CCEs and commissioners. A motion to approve the CCE candidates was presented electronically and approved. *Passed.*

Chair Byers gave a chairman's update and shared insights on the challenges, insights and strides made during a year of unprecedented challenges.

Byers turned it over to incoming Chair Chip Cherry who shared thoughts for the year ahead.

CEO Kelly provided a comprehensive update about the organization, including her thoughts and optimism about the current and future direction of ACCE.

A brief overview of the Benefits Trust offerings was provided by Bob Quick, Chair of the Benefits Trust.

Roy Williams provided a foundation report and noted that his term as chair has come to an end. Jane Clark will succeed him in this role.

Byers recognized and thanked outgoing directors for their outstanding service.

Chair Byers made closing remarks and thanked all. *Meeting adjourned.*

## **New or Reinstated Members for Approval - October 2021**

### **Organization**

Fountain Inn Chamber  
Lexington Chamber  
Boone Chamber  
Chamber of Commerce Executives of Ohio  
Hopewell Prince George Chamber of Commerce  
NOVA Hispanic American Chamber of Commerce  
Greenwich Village Chelsea Chamber of Commerce  
Surprise Regional Chamber  
Erie County Chamber of Commerce  
Weslaco Chamber of Commerce  
Zionsville Chamber of Commerce  
Sauk Chamber of Commerce  
Wilson Chamber  
Greater Menomonie Area Chamber of Commerce  
Chatham Chamber of Commerce  
Tipp City Chamber of Commerce  
Coral Springs Chamber of Commerce  
Kankakee Chamber of Commerce  
Duluth Chamber  
Charles River Chamber  
Evanston Chamber of Commerce  
Louder Nonprofit Strategies  
Old Saybrook Chamber of Commerce  
Randolph County Chamber of Commerce  
Elk River Chamber of Commerce

**Association of Chamber of Commerce Executives  
Consolidated Projects  
For the Five Months Ending August 31, 2021**

JC-09CONSBS  
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	ACCE	FBI	Foundation	Eliminations	CONS
Consolidated Balance Sheet					
<b>ASSETS</b>					
Cash	2,020,051.47	\$179,253.35	\$1,813,772.60		\$4,013,077.42
Investments	489,585.39	\$0.00	\$0.00		\$489,585.39
Investments - 457B	113,418.82	\$0.00	\$0.00		\$113,418.82
Investment in Subsidiary	506,962.40	\$0.00	\$0.00		\$506,962.40
Accounts Receivable - General (net)	104,874.86	\$126,820.99	\$0.00		\$231,695.85
Accounts Receivable - Trust	0.00	\$347,288.45	\$0.00		\$347,288.45
Grant Receivable	0.00	\$0.00	\$0.00		\$0.00
Due from Related Entities	258,092.73	\$0.00	\$0.00	(258,092.73)	\$0.00
Prepaid Expenses	64,497.09	\$22,393.31	\$15,579.57		\$102,469.97
Deposits	11,312.12	\$975.00	\$0.00		\$12,287.12
Fixed Assets, Net	224,947.19	\$83,324.05	\$0.00		\$308,271.24
<b>TOTAL ASSETS</b>	<b>\$3,793,742.07</b>	<b>\$760,055.15</b>	<b>\$1,829,352.17</b>	<b>(\$258,092.73)</b>	<b>\$6,125,056.66</b>
<b>LIABILITIES</b>					
Accounts Payable & Accrued Expenses	117,975.74	\$31,961.90	\$800.00		\$150,737.64
Accounts Payable - Trust	(7.65)	(\$2,342.00)	\$0.00		(\$2,349.65)
457B Liability	113,418.82	\$0.00	\$0.00		\$113,418.82
Due to Related Entities	0.00	\$173,033.32	\$85,059.41	(258,092.73)	\$0.00
Deferred Dues	294,826.73	\$0.00	\$9,500.00		\$304,326.73
Deferred Other	34,032.00	\$3,396.55	\$1,580,088.14		\$1,617,516.69
Deferred Rent	93,554.75	\$0.00	\$0.00		\$93,554.75
Deferred Revenue - National Sponsors	25,413.29				\$25,413.29
Note Payable	300,022.00	\$0.00	\$0.00		\$300,022.00
Capital Lease Obligations	15,026.00	\$0.00	\$0.00		\$15,026.00
<b>TOTAL LIABILITIES</b>	<b>\$994,261.68</b>	<b>\$206,049.77</b>	<b>\$1,675,447.55</b>	<b>(\$258,092.73)</b>	<b>\$2,617,666.27</b>
<b>NET ASSETS</b>					
Net Assets - Unrestricted	2,624,213.39	\$515,555.45	\$146,890.64		\$3,286,659.48
YTD Change in Net Assets	175,267.00	\$38,449.93	\$7,013.98		\$220,730.91
<b>TOTAL NET ASSETS</b>	<b>\$2,799,480.39</b>	<b>\$554,005.38</b>	<b>\$153,904.62</b>	<b>\$0.00</b>	<b>\$3,507,390.39</b>
<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<b>\$3,793,742.07</b>	<b>\$760,055.15</b>	<b>\$1,829,352.17</b>	<b>(\$258,092.73)</b>	<b>\$6,125,056.66</b>

Association of Chamber of Commerce Executives  
Consolidated Statement of Activity  
For the Year to Date Period Ending August 31, 2021

	August 21 YTD ACTUAL	August 21 YTD Budget	2021-22 Annual Budget	August 21 Actual vs. Budget YTD \$\$ Variance	August 21 Actual vs. Budget YTD % Variance	August 20 YTD ACTUAL	August 21 Actual vs. Actual % Variance
<b>FBI</b>							
Total FBI Revenue	449,015.57	450,416.67	1,081,000.00	(1,401.10)	(0%)	453,847.14	(1%)
Total FBI Expense	410,565.64	448,243.75	1,075,785.00	(37,678.11)	(9%)	383,532.37	7%
<b>FBI Net Income</b>	<b>38,449.93</b>	<b>2,172.92</b>	<b>5,215.00</b>	<b>36,277.01</b>	<b>94%</b>	<b>70,314.77</b>	<b>(83%)</b>
<b>Foundation</b>							
Total Revenue	410,753.50	487,376.67	1,169,704.00	(76,623.17)	(19%)	708,154.46	(72%)
Total Expense	403,739.52	492,992.50	1,183,182.00	(89,252.98)	(22%)	670,747.13	(66%)
<b>Foundation Net Income</b>	<b>7,013.98</b>	<b>(5,615.83)</b>	<b>(13,478.00)</b>	<b>12,629.81</b>	<b>180%</b>	<b>37,407.33</b>	<b>(433%)</b>
<b>ACCE</b>							
<b>Revenue</b>							
Awards/COY Revenue	15,000.00	14,500.00	29,000.00	500.00	3%	0.00	100%
Certification	4,400.00	4,600.00	13,800.00	(200.00)	(5%)	0.00	100%
Chamber Education	779.00	1,000.00	63,617.00	(221.00)	(28%)	294.00	62%
Chamber Executive Magazine Rev	44,250.00	47,060.00	94,120.00	(2,810.00)	(6%)	0.00	100%
Economic Development	0.00	0.00	5,000.00	0.00	0%	0.00	0%
Executive Search	5,625.46	2,500.00	6,000.00	3,125.46	56%	1,864.06	67%
Membership Revenue	527,679.34	516,666.67	1,240,000.00	11,012.67	2%	644,505.86	(22%)
Metro Cities Revenue	12,600.00	12,650.00	67,880.00	(50.00)	(0%)	7,425.00	41%
Misc Income	3,547.25	2,083.33	5,000.00	1,463.92	41%	707.77	80%
National Corporate Sponsors Revenue	184,010.11	155,940.00	303,480.00	28,070.11	15%	0.00	100%
Publications & Research Revenue	2,596.35	0.00	0.00	2,596.35	100%	847.00	67%
Virtual Summit	207,450.40	263,000.00	263,000.00	(55,549.60)	(27%)	0.00	100%
<b>Total ACCE Revenue from Operations</b>	<b>1,007,937.91</b>	<b>1,020,000.00</b>	<b>2,090,897.00</b>	<b>43,487.51</b>	<b>4%</b>	<b>655,643.69</b>	<b>35%</b>
<b>Expense</b>							
Admin (Operations, Occupancy, Governance)	185,813.78	187,553.67	562,661.00	(1,739.89)	(1%)	149,917.29	19%
Admin Personnel Costs	133,022.77	167,862.33	503,587.00	(34,839.56)	(26%)	137,616.62	(3%)
Annual Convention	0.00	0.00	0.00	0.00	0%	60,923.81	0%
Awards/COY Expense	33,273.80	22,473.00	37,473.00	10,800.80	32%	1,482.26	96%
Certifications Expense	13,655.52	10,490.83	25,178.00	3,164.69	23%	11,501.70	16%
Chamber Education Expense	25,557.91	24,998.67	149,992.00	559.24	2%	17,121.85	33%
Chamber Executive Magazine Expense	17,263.42	19,014.75	76,059.00	(1,751.33)	(10%)	25,968.45	(50%)
Divisions Expense	11,075.95	16,944.17	40,666.00	(5,868.22)	(53%)	9,894.63	11%
AskACCE	39,326.63	47,255.83	113,414.00	(7,929.20)	(20%)	35,979.37	9%
Membership Expense	152,138.51	157,746.67	378,592.00	(5,608.16)	(4%)	153,079.65	(1%)
Metro Cities Expense	3,216.61	4,568.17	54,818.00	(1,351.56)	(42%)	4,611.30	0%
National Corporate Sponsors Expense	53,395.64	67,668.75	162,405.00	(14,273.11)	(27%)	73,336.48	(37%)
Publications & Research Expense	7,314.19	7,568.33	18,164.00	(254.14)	(3%)	5,854.28	20%
Virtual Summit	142,121.36	237,072.00	237,072.00	(94,950.64)	(67%)	0.00	0%
Web Expense	15,494.82	20,861.25	50,067.00	(5,366.43)	(35%)	13,976.51	10%
<b>Total ACCE Expense from Operations</b>	<b>832,670.91</b>	<b>992,078.42</b>	<b>2,410,148.00</b>	<b>(159,407.51)</b>	<b>(19%)</b>	<b>701,264.20</b>	<b>16%</b>
<b>ACCE Net Income</b>	<b>175,267.00</b>	<b>27,921.58</b>	<b>(319,251.00)</b>	<b>202,895.02</b>	<b>116%</b>	<b>(45,620.51)</b>	<b>126%</b>
<b>Total ACCE &amp; Affiliates Revenue</b>	<b>1,867,706.98</b>	<b>1,957,793.33</b>	<b>4,341,601.00</b>	<b>(34,536.75)</b>	<b>(15%)</b>	<b>1,817,645.29</b>	<b>(39%)</b>
<b>Total ACCE &amp; Affiliates Expenses</b>	<b>1,646,976.07</b>	<b>1,933,314.67</b>	<b>4,669,115.00</b>	<b>(286,338.60)</b>	<b>(50%)</b>	<b>1,755,543.70</b>	<b>(44%)</b>
<b>Total ACCE &amp; Affiliates Net Income</b>	<b>220,730.91</b>	<b>24,478.67</b>	<b>(327,514.00)</b>	<b>251,801.84</b>	<b>36%</b>	<b>62,101.59</b>	<b>5%</b>

## **ACCE Finance Report**

**August 31, 2021 Financial Statements (5 months into the FY)**

### **Balance Sheet**

Our cash position is strong with over \$4.1 million. Notes Payable includes \$300k for ACCE's PPP loan which we are in the process of applying for forgiveness. Total net assets are standing at \$3.4 million.

### **Consolidated Statement of Activity**

Membership Revenue – ACCE membership is 2% above budget. We are cautiously optimistic about this line item due to the hiring of a new membership salesperson who started in July.

Virtual Summit – This year's virtual summit was well received and well attended. Please note that the financials provided from August are not 100% final. We had over 900 registrants, slightly lower than, but comparable to last year. We budgeted a relatively aggressive attendance figure following our record-setting 2020 virtual summit. Attendance was still strong considering many chambers were back to regular event programming this year compared to 2020 when we had a captive, primarily remote audience. However, we did not meet our stretch goal for attendees. Our sponsorship funding was slightly lower this year due to a handful of sponsors who did not want to participate in a second virtual event, and instead are waiting for our next in-person program. Sponsor funding was still very close to budget. We were able to reduce expenses significantly this year without reducing the quality of the conference, therefore this year's summit yielded a strong profit with a net positive variance compared to the budget. We should have final summit financials at our winter board meeting.

ACCE Expenses from Operations – Most expenses for the first five months of the fiscal year are lower than budget. We anticipate that our expenses will be close to budget for the remainder of the year and we continue to invest in the areas of need for the future of our association.

Net Income – Five months into the year the ACCE net is better than budget. FBI is running ahead of budget and the foundation also currently has a positive net income. The foundation's income, which is dependent on grants, can vary significantly in its short-term revenue due to grant delivery even though foundation funding for the next seven months looks strong.

**Membership & Professional Development Report**  
**Anissa Starnes, IOM / Vice President, Member Engagement**  
**Susan O’Sullivan McGuire / Senior Director, Professional Development**

## **Membership Recruitment and Retention**

- Kate Teel, our new membership lead, has hit the ground running. She started with ACCE on July 6 and since that time, she has added twenty-six (26) new members to ACCE totaling more than \$15K in new member income and has collected \$55,285 in past due funds.
- If board members have any leads for prospective members, please direct them to Kate at [kteel@acce.org](mailto:kteel@acce.org). We have a new membership flyer you can use to promote ACCE, located here: <https://adobe.ly/3FPUM Ae>
- Anissa, Kate, and Ellie Colt (Coordinator, Partnership & Membership Development) are working together to create a revamped on-boarding plan for new members and new staff of existing members.
- ACCE staff continues to assist the membership with gaining access to the online membership portal. If you or your team needs assistance in accessing the portal, please reach out to Ellie at [ecolt@acce.org](mailto:ecolt@acce.org)

## **CCE program**

Applications for our 2021 CCE class are due on January 10, 2022. We offered an on-demand CCE process workshop at our Chamber Innovations Summit, followed up by a speed mentoring session offering candidates one-on-one advice and guidance from experienced CCEs. Our annual CCE reception was also held during the summit and honored our class of 16 new CCEs.

We also held a live CCE webinar on October 7, which provided an overview of the process and featured advice from a member of our 2021 CCE class. The 2022 program will again be all-virtual to promote inclusivity during a year in which many chambers are experiencing budgetary restrictions. Our fall CCE marketing campaign includes video testimonials from our new CCE class. We continue to review and revise our exam, recommended reading, and other resources to reflect current best practices for chamber leadership.

## **E-learning**

Online learning this fall includes webinars on strategic program and event realignment, expanding the labor pool, the future of downtowns, DEI events, public/private partnerships for chambers, award-winning chamber communications, educator externships, and more. These offerings will be supplemented by division-specific roundtables and our Event Training Conference, which will be held virtually on October 15 and 16 (see Events Division report).

All webinars and roundtable calls are now accessed through our online learning portal, which also provides streamlined access to webinar recordings, online eCourses, and other resources. Selected content from our 2021 conferences and Chamber Innovation Summit will also be made available in this portal when platform access to attendees has expired. Plans for a multi-module online certificate in chamber management, featuring micro-credentialing, are in the works for launch in late winter/spring 2022.

## Summit 2021

Our summer summit took place virtually on July 19-21. The program focused on the transformational leadership to help our communities bounce back stronger than ever, as we explored major trends driving the future of our industry. We had 932 registrants. Our registration income was lower this year over the virtual summit of 2020 and we attribute that to chambers being back in the office and engaged in their own programming and community events. We saw fewer multiple registrants from individual chambers compared to last year. It was still a significant attendance rate for the program, and we decreased our expenses significantly due to a change in the online platform, which also increased staff efficiency. As of August 31, 2021, the summit shows \$60k net revenue, which is above the budgeted and projected amounts.

## Convention 2022 - *July 26-29 in Indianapolis!*

Planning has begun for the 2022 in-person convention! Our team visited Indy in September and held a great planning session with the Indy Chamber, CVB and convention center and host hotel. We plan to open online registration earlier than usual this year to encourage members to plan early. We are taking the opportunity of the “2-year break” due to the pandemic to evaluate the entire convention program from expo, content, social events, and schedule to present a ***New and Improved*** Convention that you won’t want to miss.

## Information Office

The [AskACCE Team](#) continues to provide Q&A and in-depth research services to ACCE members and has seen an increase in research topics, due largely to the focus on member retention data. For July, August and September – we responded to 166 ticket requests into [AskACCE@acce.org](mailto:AskACCE@acce.org), with 82% of the requests being answered and closed within 24 hours of initial request.

The 2020 Economic Recovery Report was published and distributed in July. All members received the Executive Summary report at no cost, and members who participated in the 2020 Ops Survey, receive a free copy of the full report. For members who did not participate, the full report is available for purchase for \$99. Non-members may also purchase the full report for \$250.

Some of the themes of the requests fell into these categories:

Supply chain forum examples

Chamber DEI examples

Investor levels for supporting economic development

Talent attraction best practices

Starting a foundation

Economic development, i.e., ARPA funds, Buy Local programs, starting minority business councils

Need for speakers and consultants on various topics

Workforce shortage

Personnel management, i.e., team culture best practices, search firms, hiring, and compensation

Operations and HR docs: commission samples, CEO contracts, strategic planning RFPs

Membership: statistics, average rates, retention calculations, eligibility (bylaw language)

## **U.S. Chamber Institute**

Anissa is serving as the liaison for ACCE with the U.S. Chamber Institute for Organizational Management program. She serves as a member of the Board of Trustees and the Curriculum Committee. Institute is holding its Centennial Institute at the University of Georgia on November 8-12, 2021, celebrating 100 years of Institute. Anissa will also serve as faculty for this site, teaching the “Revvng Your Revenue Stream” and “Sponsorship Solicitation” courses. Kate Teel, Director of Membership for ACCE will also graduate Institute this year and will be attending the program virtually.

# Communications & Networks Report

## Will Burns, Vice President – Communications & Networks

### ACCE Communications

**Chamber Executive:** The Summer 2021 edition of *Chamber Executive* is online. The issue explores key initiatives from our 2021 Chamber of the Year winners, introduces our new class of CCEs, shares lessons learned from our first Fellowship for Economic Recovery and features tips from chamber sales and development professionals.

- The Fall 2021 issue will launch in November. It will feature ACCE's annual 40 Under 40. It will also highlight the future of work and workplace flexibility, share insights from chamber operations professionals and more.

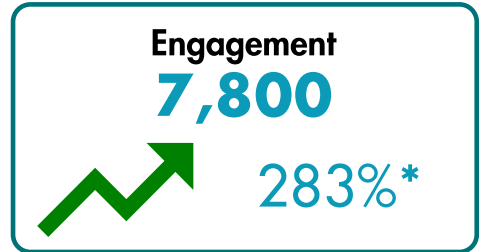
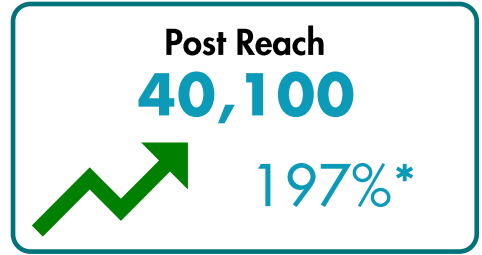
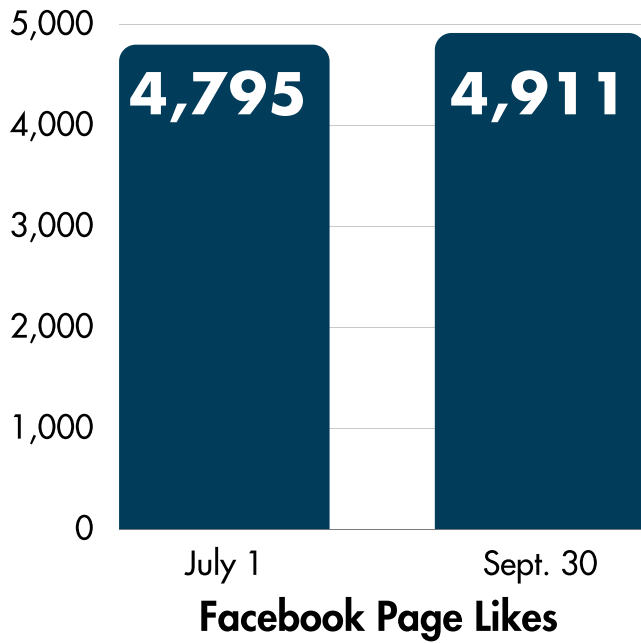


**Support Your Local Chamber of Commerce Day:** ACCE created online resources to help chambers of commerce tell their stories and showcase their impact during Support your Local Chamber of Commerce Day on October 20. Our efforts included a [promotional video](#) about the impact of chambers, advice for chambers looking for [new ways to celebrate](#) and a library of [customizable social media graphics](#).

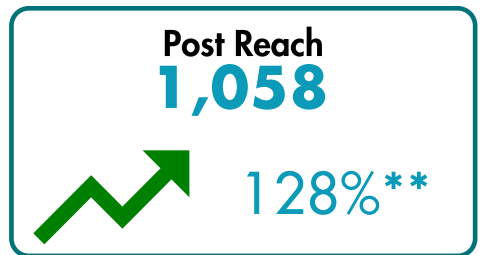
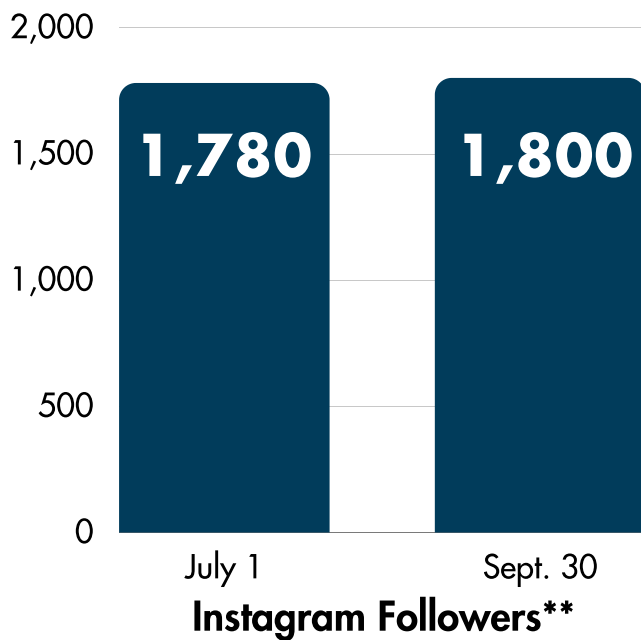
**Social Media Ambassadors Program:** ACCE launched a new social media ambassador program to engage targeted chamber professionals to share ACCE's story and elevate the chamber industry and profession. ACCE will provide the ambassadors access to regular updates, scripted messages and social media graphics. Ambassadors will amplify key messages around ACCE thought leadership, upcoming professional development programs, the 2022 ACCE Convention and more.

**Social Media Growth:** As part of our renewed focus on the association's social media presence, we've created a new quarterly report to track the growth in reach and engagement across a number of social media platforms. Please find the latest report below.

# Q3 2021 ACCE SOCIAL REPORT



\*Compared to Q2



\*\*Compared to Q2



Video Views

**7,200**

YTD: 18,484

New Subscribers

**+40**

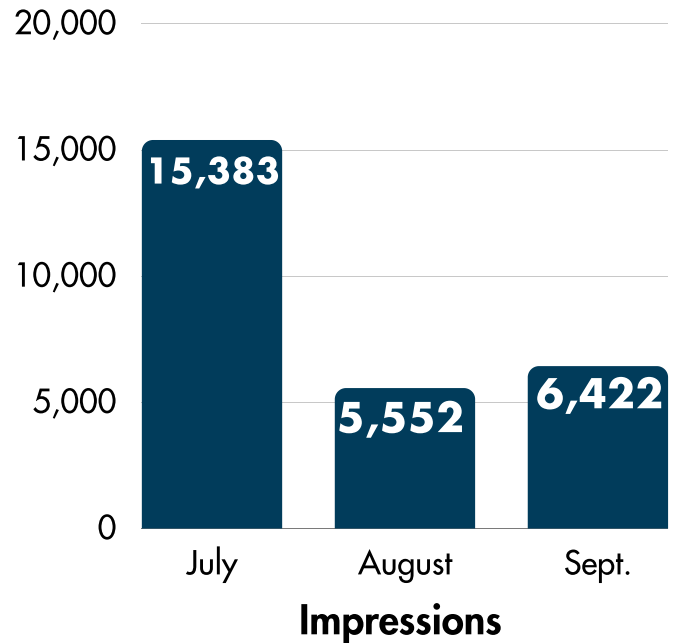
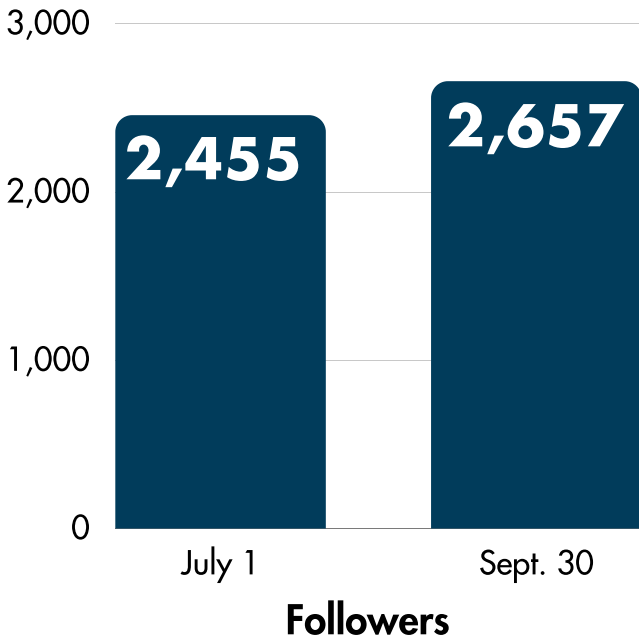
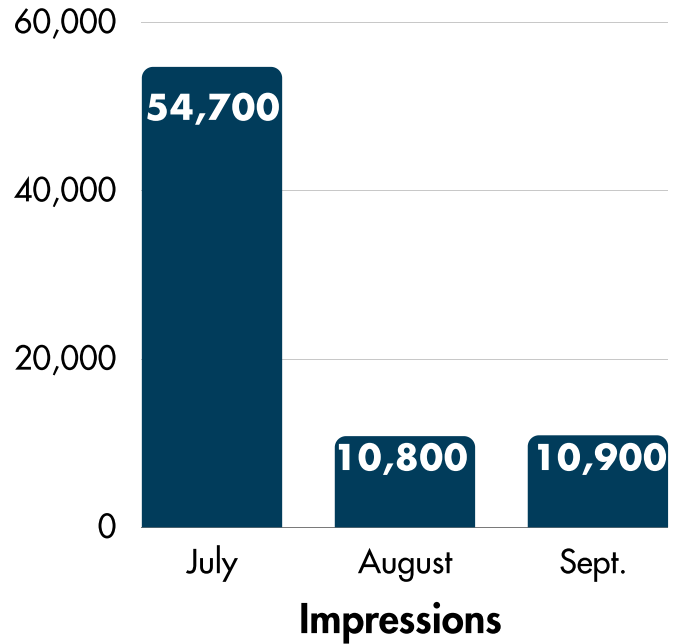
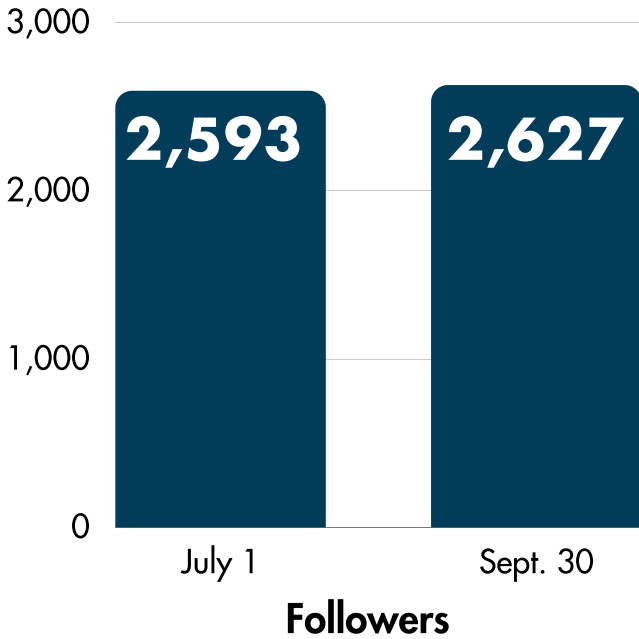
Total Subs: 633

Watch Time

**320 hours**

YTD: 1,200 hours

# Q3 2021 ACCE SOCIAL REPORT



Analysis: July included a "Convention Bump." Because of the amount and type of content we were sharing in July, including award winners and an increase in chamber faces, ACCE social channels will most likely see a bump in reach and engagement around Convention annually. July should be treated as an exception rather than the rule.

## Community Peer Groups

**Metro Cities Council:** The Metro Cities Council met in person on September 26-28 in Boston, hosted by the Greater Boston Chamber. The program featured speakers from Harvard, MIT, the Federal Reserve Bank of Boston, Comcast, PwC and more. In a mix of presentations and roundtable discussions, the group covered a variety of topics, including the future of work, digital divide, political fragmentation, Boston's life sciences ecosystem and more. Roundtable calls continue every other month, with the next call on November 17.



**Major Cities Council:** The Major Cities Council CEOs met in-person on August 29-31 in Duluth, Georgia, hosted by the Gwinnett Chamber. The group discussed economic and workforce challenges, how to package and sell community impact work, post-COVID membership strategies, bi-lateral and ethnic chamber partnerships and more. Roundtable calls are every other month, with the next call scheduled for November.



**Emerging Cities Council:** Our September Emerging Cities Council roundtable featured peer discussion led by Council Chair RaDonna Hessel on the challenges raised by current worker shortages. Our last call of 2021 is scheduled for November 17. Our group continues to grow in membership, and its Google Group remains a valuable and active resource for additional ideas and information-sharing among members.

**Hometown Chamber Council:** The Hometown Chamber Council's September call focused on challenges created by COVID spikes, the Delta variant and students returning to school. The council's next call will be held on November 17 and will focus on board management. The council's Google Group remains active, and recent discussions have focused on workplace flexibility and leave policies.

## Divisions

**Membership Development Division (MDD):** During the July Chamber Innovation Summit, we recognized over 35 ACCE membership professionals with awards for outstanding sales performance during the past year and over their careers. Several winners shared success strategies in a September roundtable featuring small-group discussions on key sales and retention challenges. Further roundtables led by division advisory board members will be held throughout the fall, capped off by a December "Coffee and

Connections” event featuring informal networking opportunities. Fall peer learning includes webinars on public/private partnerships to support small businesses and member win-back campaigns. The first quarter of our new sales contest year wrapped up in early September. We are tentatively planning our first in-person sales training conference in two years for March 2022; a location and date will be determined soon.

**Communications Division:** The division continued its roundtable calls focused on chamber communications strategies and tactics. Its September call focused on communicating chamber COVID event guidelines and new member onboarding email campaigns. The division’s next call will be in November.

**Diversity, Equity & Inclusion Division:** The division continues to hold monthly roundtable calls about the work chambers are doing in this area. Recent calls focused on expanding the labor pool by targeting untapped talent and navigating the chamber’s role in community DEI efforts. Upcoming calls will focus on DEI-focused events.

**Economic & Community Development Division:** The division continues to hold calls to discuss economic and community development. Recent roundtables discussed trends in the industry. Upcoming calls will cover the future of downtowns and the different ways that chambers partner with their local EDOS. ACCE is hosting its Site Consultant Program in Oklahoma City in November as part of the 2021 Talent and Economic Development Annual Meeting.

**Education & Talent Development Division:** The division continues its roundtable calls and webinars. ACCE recently offered webinars on how chambers are changing their work-based learning as a result of the pandemic and how chambers are working with local colleges to get high school graduates enrolled in higher education. Upcoming webinars will cover educator externships and how chambers are building partnerships to support upskilling and reskilling.

**Events Division:** Fall peer learning opportunities covered topics including strategic event realignment and updates to in-person event safety protocols. Networking and informational calls were also held for young professionals program organizers and organizers of intercity visits. Over 100 events professionals participated in our annual events training conference on October 14 and 15. The event featured content on mission-oriented annual meetings, event marketing, building adaptable events, best practices for inclusive events, self-care for event professionals, and more. All content was recorded and will be available to participants through January 14, 2022.

**Finance & Operations Division.** Our fall division roundtable will be led by division advisory board lead Neil Christopher of the Mobile Area Chamber of Commerce and will focus on challenges relating to staff retention and staff burnout. We will discuss national and chamber-related data on these subjects as a resource for our discussion. Additional division roundtable calls are scheduled for January, March, and May 2022.

**Government Relations Division:** The division continues monthly calls to share insights and help government relations professionals navigate challenging times. Our September call focused on chamber initiatives to address childcare challenges. The next call is scheduled for October 28. The division is planning its annual in-person meeting November 14-16 in Chattanooga, Tennessee. The meeting will focus on policy priorities, political engagement and internal processes for managing a chamber GR program.

## **Partnerships & Sponsorships** **Beth Bronder, VP Development & Partnerships**

### **Corporate Sponsorship:**

In the last 18 months we've had to be nimble with sponsors from both a timing and deliverables/execution perspective. While creating more work for the team the result is sponsors feeling more engaged and committed to ACCE than pre-pandemic. They share our enthusiasm for an even better year in 2022.

As of October 1, we are 100% collected on revenue owed from both corporate sponsors and summit sponsors/exhibitors. While a handful of exhibitors decided not to participate in ACCE's second virtual summit this year and wanted to wait to participate in-person, we still had a strong showing of supporters.

### **Prospecting/Revenue Opportunities:**

We continue our strategy of approaching larger, national companies focused on community development, small business, workforce initiatives and/or inclusive recovery/DEI. In addition, we are looking for smaller solutions providers offering unique opportunities for chambers and their members. Both efforts will hopefully expand our current roster of 19 partner organizations.

We're also working with the professional development team to create and sell more division, peer group and regional event sponsorships to very targeted and relevant companies to grow revenue for those groups and boost support for those gatherings in 2022.

Finally, we're beginning to explore partnership opportunities to monetize excess advertising inventory on *Chamber Executive* magazine while maintaining content standards (i.e., not low-value, low-end ad retargeting).

### **Convention 2022:**

Plans for convention 2022 are beginning to take shape including a "reimagined" expo hall that will be physically closer to the rest of the programming and will be integrated into the education and social aspects of the overall event experience. Our team is committed to creating more of a community environment that is interactive, engaging and even fun for both attendees and vendors. More on this to come!

# Foundation Report

Amy Shields, Executive Director – ACCE Foundation

## Foundation Programming



**Equitable Credential Attainment Cohort Program:** The ACCE Foundation received a [\\$1.3 million grant](#) from Lumina Foundation to strengthen chamber of commerce partnerships with community colleges to increase the number of adult learners of color who earn an industry-relevant credential or degree. Six to eight communities will be selected to participate

in an 18-month program. Teams will receive technical assistance and subgrant funding as they work together to drive the growth of credentialing and degree programs in their regions and to place workers, particularly BIPOC workers, in well-paid jobs with opportunities for career advancement. Teams have until November 5, 2021 to review information about the program and to [submit their response to the RFP](#).

**Diversity, Equity and Inclusion Programs:** Planning has started for a half-day virtual DEI convening for ACCE members for early 2022. The team is developing a DEI content strategy that will be inclusive of regular programming, special workshops, on-demand courses through our learning management system and other ways of delivering content. The 2021 Events Training Conference will include a speaker talking about planning events with a DEI focus. The ACCE Foundation continues to identify potential funding for DEI.

**ACCE Foundation Fellowship for Inclusive Economic Growth:** This year's [Fellowship program](#) launched in August with 21 chamber executives from across the country. In September, the cohort participated in a virtual convening to learn more about the future of the chamber industry and what it means to build a more inclusive economy. Upcoming sessions will cover systems change and using data to inform decision-making.



## Grant-Specific Programmatic Work

**Workforce and Skills Policy:** In partnership with the National Skills Coalition's Business Leaders United (BLU), the ACCE Foundation continues to support chambers in several key states as they advocate for state-level policies to build a more skilled workforce. State network leads meet regularly with each other and with national supporters. ACCE staff have recommended chambers to participate in listening sessions on workforce training and on funding the workforce system and have provided insight on how chambers are thinking about racial equity. We are currently in discussions about the third year of this partnership.

**Smart Justice:** ACCE is working on a grant from the Clean Slate Initiative to engage chambers as more productive partners in efforts to eliminate barriers to workforce participation for individuals with a criminal record and help employers cultivate this untapped segment of the workforce. The goal of the initiative is to support state efforts to leverage technology to automate the complex and time-consuming record clearing process for those individuals eligible for expungement under current state laws. ACCE Foundation will educate and engage chambers leaders in 12-15 states, building on recent chamber-supported clean slate efforts in Pennsylvania, Utah and Michigan. Our next Smart Justice Peer Learning Community call will take place in November and focus on chamber of commerce second chance hiring advocacy and initiatives.

**Early Childhood Engagement:** Through a grant from the Pritzker Children's Initiative, the ACCE Foundation is working with nonprofit networks in several states to increase the engagement of the business community in programs and policies that impact children ages three and younger. ACCE Foundation has

been working in seven states: South Carolina, Texas, Ohio, Michigan, Louisiana, Pennsylvania and Nevada. In some states, chambers have already been invited to participate in listening sessions or webinars to learn more about early childhood initiatives. These conversations will continue through the fall.

## Foundation Action Plan Updates

In Spring 2021, the ACCE Foundation received recommendations from a third-party auditor on how it could improve its staffing, fundraising, governance, technology and processes to support long-term growth. The team developed a three-year action plan to put these recommendations into practice. Below are a few highlights of recent work:

- **Staffing:** ACCE realigned the role of the ACCE Foundation Executive Director to focus on the programmatic and strategic priorities of the Foundation. We also brought on Rumsha Ahmed, Manager, Community Impact Programs, to support the work of the ACCEF.
- **Fundraising:** In coordination with an external consultant, we have identified ten promising prospects to cultivate for our fundraising efforts. We are building out our engagement strategy to target these funders. We have also engaged a consultant to help us develop a case for support for the ACCE Foundation. This narrative will assist us in our fundraising efforts and will provide clear and compelling narrative on the importance of chambers' community impact work.
- **Governance:** The ACCE Foundation has a long-standing relationship with UNITE-LA. Giving how ACCEF has grown, we are amending the current MOU that governs how we work together. A task force of ACCEF Board members was involved, and the new MOU will be ratified at the October 2021 ACCEF Board meeting.

## Development Pipeline and Partner Cultivation

### Higher Education and Workforce Development

- Received \$1.3M from Lumina Foundation to build partnerships between a set of chambers, community colleges and partners to increase credential attainment. The grant began in September 2021 and will continue through August 2023.
- Working on a follow-on grant proposal with the Kresge Foundation on the role chambers of commerce can play in higher education ecosystem change. This grant would look at the ways that systems must shift in response to the pandemic and in preparation for changes to our economy.
- Developing relationships with Ascendium Education Philanthropies to support rural postsecondary education and rural workforce development. The team is interested in considering how chamber and business engagement in rural systems might be beneficial to their work.

### Small Business and Entrepreneurship Support

- Developing relationships with the Truist Foundation related to supporting small business owners of color and increasing opportunities for economic mobility.

### Smart Justice

- Developing relationships with staff at The Just Trust, a foundation that was created by the Chan Zuckerberg Initiative focusing on criminal justice reform.

### Career Readiness and Talent Pipelines

- Drafting a follow-on grant for the Pritzker Children's initiative. This work would be a continuation and expansion of the early childhood engagement work mentioned in the previous section.
- Developing relationships with staff at the Carnegie Corporation. Carnegie's priorities include creating flexible pathways for students with the goal of college completion and preparing students for work. They are also interested in equitable systems change within the education system.
- Developing relationships with staff at the Markle Foundation, whose work focuses on skills-based training and employment practices to help decrease bias and increase diversity in the workforce. Continuing to discuss opportunities for joint funding proposals in the future from the Gates Foundation, ECMC or the Surdna Foundation.

**Fringe Benefits, Inc.**  
**Robin Anderson, CCE – Chairman**

The team has been heavily focused on compliance for the 401k plan. Additionally, we have been finalizing details for the 2021 annual 401k participant notices and are in final stages of wrapping up the 2020 plan year testing and audit. The changes on the 401k plan reviews implemented last year continue to show promising results and the team has a debrief and 2022 strategic planning session scheduled with Principal.

The Principal Retire Secure Meetings delivered through Zoom are continuing in their popularity. These are the best path for FBI staff and participating employers to increasing participant engagement and preparation for retirement. This is also great financial education for your staff.

We are also getting great response to the new Plan Administrator webinars. These are held quarterly with two sessions available on various topics. The team is looking to develop new topics and record these in the future so they can be watched at any time and incorporated into the Plan Administrator training program.

Regarding our insurance offerings, we have negotiated an increase in revenue sharing with CIGNA on the dental program while maintaining current premiums for participants. Our new insurance billing process has also been successful, with more improvements planned in the future as well.

## ACCE External Affairs Engagement

As the national association serving and representing the chamber community, it's critical that ACCE staff spend time imbedded 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	Mar. '21	IA Assoc. of Chamber Execs Spring Conference	Keynote (virtual)	The Future of Chambers & Diversifying Income Streams
Anissa Starnes	Mar. '21	IA Assoc. of Chamber Execs Spring Conference	Presenter (virtual)	Retention, Recruitment, Renewals and Recovery
Sheree Anne Kelly	Mar. '21	Big Bear Chamber board meeting	Speaker (virtual)	The Community Impact of a Foundation
Sheree Anne Kelly	Mar. '21	Morrisville Chamber board meeting	Speaker (virtual)	The Future of Chambers
Sheree Anne Kelly	Mar. '21	Chattanooga Chamber board meeting	Speaker (virtual)	The Future of Chamber Value & Relevance
Sheree Anne Kelly	Mar. '21	ICC-WCF	Member (virtual)	Chamber 4.0 Task Force Workshop
Alysia Bell	Mar. '21	National Collaborative for Infants and Toddlers (NCIT)	Virtual	Participated as a member of the Movement Building Steering Committee
Sheree Anne Kelly	Apr. '21	MA Chamber execs annual meeting	Speaker (virtual)	The Future of Chambers
Sheree Anne Kelly	Apr. '21	Americans for the Arts	Speaker (virtual)	ArtsU Webinar: How to Partner with Your Local Chamber
Sheree Anne Kelly	Apr. '21	Fredericksburg Regional Chamber board meeting	Speaker (virtual)	The Future of Chambers
Sheree Anne Kelly	Apr. '21	USCC CCC100 Spring Virtual Meeting	Member	3-day event featuring topics & speakers: political affairs and federal relations
Anissa Starnes	Apr. '21	Chamber Association of Alabama	Webinar	The Power of Email Marketing for Chambers
Anissa Starnes	Apr. '21	YGM Total Resource Campaigns, TRC Talks: Ideas and Inspiration	Speaker (virtual)	How Chamber Professionals Can Use ACCE to Grow Their Chambers
Sheree Anne Kelly	May '21	ICC-WCF	Member (virtual)	Executive Committee and General Council meetings
Sheree Anne Kelly	May '21	Americans for the Arts	Panelist webinar	Local Arts Agencies and Chambers of Commerce – the Very Basics Live Discussion
Sheree Anne Kelly	May '21	Toledo Regional Chamber board meeting	Speaker (virtual)	Chamber Industry Overview, Best Practices and Industry Trends
Sheree Anne Kelly	May '21	Aurora Regional Chamber board of directors	Facilitator (virtual)	Strategic planning retreat

Sheree Anne Kelly	May '21	Lynchburg Regional Business Alliance board meeting	Speaker (virtual)	The Future of Chambers
Sheree Anne Kelly	May '21	ICC-WCF	Member (virtual)	Chamber 4.0 Task Force Workshop
Sheree Anne Kelly	June '21	Montana Assoc. of Chamber Execs	Spring Conference (in person)	Keynote speaker and session: Strategic Planning – a Roadmap
Sheree Anne Kelly	June '21	ICC-WCF	Member (virtual)	Chamber 4.0 Task Force Workshop
Sheree Anne Kelly	July '21	The Silicon Valley Org staff meeting	Speaker	The Future of Chambers and ACCE e-tour
Alysia Bell	July '21	National Collaborative for Infants and Toddlers (NCIT)	Virtual	Represented ACCE on the Steering Committee
Sheree Anne Kelly	Aug. '21	Toledo Regional Chamber staff meeting	Presenter (virtual)	Telling Our Chamber Story
Anissa Starnes	Aug. '21	Chamber of Commerce Association of Alabama	Attendee	Annual Conference
Sheree Anne Kelly	Sept. '21	Chamber of Commerce Execs of OH board retreat	Columbus OH	Facilitated strategic planning retreat
Sheree Anne Kelly	Sept. '21	Pickerington Area Chamber board retreat	Pickerington OH	Facilitated strategic planning retreat
Sheree Anne Kelly	Sept. '21	USCC Committee of 100	Washington DC	Annual meeting
Sheree Anne Kelly	Sept. '21	KY Chamber of Commerce Execs annual meeting	Lexington KY	Keynote speaker: The Future of Chamber Value & Relevance
Sheree Anne Kelly	Sept. '21	Convergent podcast	Guest (virtual)	The Difference: Nonprofit Fundraising in a For-Profit World
Sheree Anne Kelly	Oct. '21	IA Assoc. of Chambers of Commerce	Presenter (virtual)	The Future of Chamber Value & Relevance – What's Next
Sheree Anne Kelly	Oct. '21	PA Assoc. of Chamber Professionals	Johnstown PA	Keynote speaker: The Future of Chamber Value & Relevance

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](mailto:skelly@acce.org).