

Board of Directors Meeting

July 22, 2025
Philadelphia, PA



ASSOCIATION OF
CHAMBER OF COMMERCE
EXECUTIVES

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Board of Directors Briefing Book

July 22, 2025

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ACCE Board of Directors Meeting

July 22, 2025 | 2:30 p.m. EDT

Philadelphia, PA

AGENDA

- | | |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2:30 pm | Welcome |
| 2:35 pm | Introduction of Incoming Board Members |
| 2:45 pm | Governance <ul style="list-style-type: none">• Approve Minutes from April 30, 2025 Meeting• Consent Agenda – New Members for Approval• Treasurer’s Report<ul style="list-style-type: none">○ Year-end Financials○ Finance Report through May 31, 2025○ Cash Flow & Investment Strategy Update• Nominations Committee Reports<ul style="list-style-type: none">○ Officers Nominating Committee<ul style="list-style-type: none">- Changes to Officers Slate 2025-26- Election of Officers 2025-26○ Board Nominating Committee• 2025 CCE Commissioners & Candidates |
| 3:00 pm | Chairman’s Update – Year in Review |
| 3:20 pm | CEO Update |
| 3:30 pm | ACCE Foundation |
| 3:35 pm | ACCE Benefits Trust |
| 3:40 pm | Recognition of Outgoing Officers & Directors |
| 4:00 pm | Adjourn |



Board of Directors Governance Meeting Calendar

2025

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.

2026 meetings will be announced in the near future.

ACCE Board Meeting

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

Boston, Massachusetts

MINUTES

Present: Juliet Abdel, Sara Barnett, Becky Bartoszek, James Bell, Katy Brooks, Chellie Cameron, Omar Cuevas, Kim Dahlsten, Sarah Davasher-Wisdom, Bob Durkin, Natalie English, Ian Fletcher, Eric Godet, David Griggs, Joshua Gunn, Jaime Henning, Andrew Hoan, Pammie Jimmar, B Kyle, Sandra Lombana Lindquist, Nick Masino, Belinda Mathews Stenson, Steve Millard, Derek Miller, Matt Morrow, Tim Murray, Roy Nascimento, Jodi Owczarski, Mark Owens, Amanda Payne, Carlos Phillips, Brittany Quick-Warner, Sara Ray, Joe Reardon, Rory Ring, Keitha Robson, Jim Rooney, Maria Salinas, Kevin Sheilley, Amy Shuttle, Ernest Strickland, Heather Valudes, Kevin Walker, Kami Welch and Samira Zimmerly

Excused: Brian Anderson, Sara Armstrong, Alisha Benson, Candace Boothby, Kati Capozzi, Adrienne Cole, Nikki Devitt, Angela Franco, Barbara Jean Garza, Katie Kirkpatrick, Sherry Menor-McNamara, Ali Rauch, Mary Beth Sewald, Baiju Shah, Nancy Spivey, Cassie Stoner, Ryan Unger, and Tony Vedda

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

Chair Jim Rooney welcomed all to Boston and called the meeting to order.

CEO Sheree Anne Kelly provided the president's report including the state of ACCE and current initiatives.

Rooney reviewed the minutes from the January 30, 2025 meeting. A motion to accept the minutes was made by Becky Bartoszek. Seconded by Carlos Phillips. *Motion carried.*

Rooney 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 Katy Brooks and seconded by Nick Masino. *Passed.*

The financial report was presented by Treasurer Maria Salinas. She noted that our cash position is strong, with total net assets at \$5 million. Membership revenue is higher than budget. The convention showed a net profit of approximately \$141k – higher than budgeted net revenue. Overall, expenses for the eleven months of the fiscal year are lower than budget and ACCE's net is better than budget. FBI and the foundation also have a positive net income. A motion to accept the financial report was made by Omar Cuevas and seconded by Sandra Lindquist. *Passed.*

Salinas then presented the proposed budget for 2025-26 which has been approved by the finance and executive committees. She noted that the budget has been approached with a solid financial position given the organization continues to have a strong cash position. She reviewed the budget in detail including its major initiatives and stated that ACCE's consolidated operations are projected to have a positive net income of \$68,209. The foundation is budgeted to have a net surplus of \$978 while FBI has a projected a net loss of \$66,488. ACCE's projected surplus is \$742. Kevin Sheilley made a motion to adopt the proposed budget for fiscal year 2024-25; seconded by Natalie English. *Passed.*

CEO Kelly informed the board that an allocation of \$70k from ACCE's Short Term Opportunity Reserve Fund will be used to purchase a new LMS system. She noted that the finance and executive committees have approved of this transaction. Kelly provided an overview of the current LMS, its limitations and the need for a new platform that is more user-friendly with much broader functions and capabilities.

Kelly informed the committee about a cash transfer to the Short Term Opportunity Reserve Fund, a decision that was made in conjunction with the CFO, Treasurer and finance committee to align with ACCE's investment policy.

Kelly provided an update on ACCE's investment strategy.

Audit Chair Brittany Quick-Warner provided an update on the annual audit which has been completed and approved by the finance and executive committees. Steve Marconi from Rogers & Company joined virtually to present a clean audit report. Eric Godet made a motion to approve the audit which was seconded by Amanda Payne. *Motion carried.*

Nominating committee chair Carlos Phillips reported that the officers' nominating committee has completed its due diligence and has lined up a solid leadership slate for the 2025-26 governance year. A formal vote on the officers' slate will be held at the July board meeting in Philadelphia. The board nominating committee convened on April 23 to begin its work. He anticipates the process will be completed in the coming weeks and the ballot will be sent out to the membership in late May or early June.

Foundation Chair Ian Fletcher shared an update on the foundation and its latest work.

FBI Co-chair Roy Nascimento provided an update on annual 401k compliance reviews and the cybersecurity audit which is almost complete.

A panel discussion about disaster preparedness and response was led by Jim Rooney, Amanda Payne and Maria Salinas.

Rob Levin, Senior Partner at McKinsey & Company, presented on harnessing the power of AI and ethical considerations for its usage.

John H. Shaw, Vice Provost for Research at Harvard University, spoke about the university's response to federal changes and the impact on research funding.

Babson College President Stephen Spinelli, Jr., PhD, spoke about entrepreneurial leadership and how Babson College has become a frontrunner in fostering entrepreneurship within its student body. An interactive discussion followed.

Rooney made closing remarks. *Meeting adjourned.*

New Members for Approval

Month	Organization Name	State or Province
April	Convergent Nonprofit Solutions	Georgia
April	Winterville Chamber of Commerce	North Carolina
April	Talbot County Chamber of Commerce	Maryland
April	Yodel Event Calendar	Ohio
April	Glue Up	Virginia
May	North Tampa Bay Chamber	Florida
May	Wickenburg Chamber of Commerce	Arizona
May	Chamber of Commerce for Greater Milford	Delaware
May	Aha! Advisors	North Carolina
May	Visit KC	Missouri
May	Lewisville Area Chamber of Commerce	Texas
May	Mark C. Perna	Ohio
May	JAX Chamber	Florida
May	Atlantic Chamber of Commerce	Nova Scotia
May	Chamber Professionals of Ohio	Ohio
May	HotelPlanner	Florida
May	Clarksville Lake Country Chamber of Commerce	Virginia
May	Lumin Strategies	North Carolina
May	Olive Branch Chamber of Commerce	Mississippi
May	Boone Area Chamber of Commerce	North Carolina
May	Development Counsellors International	New York
May	Bermuda Chamber of Commerce	Bahamas
June	Ottawa Area Chamber of Commerce	Ohio
June	Royal Gorge Chamber Alliance	Colorado
June	Preble County Chamber of Commerce	Ohio
June	The Bill of Rights Institute	Virginia
June	Plexus LGBT & Allied Chamber of Commerce	Ohio
June	Your Part Time Controller	Pennsylvania
June	Rare Blue Moon Marketing	Florida
June	National Purchasing Partners	Washington
June	Wyandot County Chamber of Commerce	Ohio
June	Monterey County Business Council	California
June	Franklin County Chamber of Commerce	Massachusetts
June	Ontario Chamber of Commerce	Ontario
June	ChildCareOwner	North Carolina

Association of Chamber of Commerce Executives
Consolidated Projects
Year-End Financials March 31, 2025

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	ACCE	FBI	Foundation	Eliminations	CONS
Consolidated Balance Sheet					
ASSETS					
Cash and Cash Equivalents	2,611,086.83	272,101.67	702,415.02		3,585,603.52
Investments	1,766,495.75	61,817.36	-		1,828,313.11
Investments - 457B	392,786.37	-	-		392,786.37
Investment in Subsidiary	461,049.64	-	-		461,049.64
Accounts Receivable - General (net)	48,448.72	198,558.17	879.26		247,886.15
Accounts Receivable - Trust	99.12	311,250.00	-		311,349.12
Grant Receivable	-	-	-	-	-
Due from Related Entities	130,031.95	-	-	(130,031.95)	-
Prepaid Expenses	134,404.11	30,108.63	2,813.47		167,326.21
Prepaid Expenses - Convention	152,645.56	-	-		152,645.56
Deposits	2,950.00	2,950.00	-		5,900.00
Fixed Assets, Net	67,207.10	30,685.67	-		97,892.77
Right of Use Asset	45,648.00	-	-		45,648.00
TOTAL ASSETS	\$ 5,812,853.15	\$ 907,471.50	\$ 706,107.75	\$ (130,031.95)	\$ 7,296,400.45
LIABILITIES					
Accounts Payable & Accrued Expenses	255,562.34	76,236.87	27.90		331,827.11
Accounts Payable - Trust	99.12	207,581.60	-		207,680.72
457B Liability	392,786.37	-	-		392,786.37
Due to Related Entities	-	84,675.43	45,356.52	(130,031.95)	-
Deferred Dues	845,414.26	-	-		845,414.26
Deferred Other	33,170.00	-	349,771.08		382,941.08
Lease liability	49,279.00	-	-		49,279.00
Deferred Convention	195,920.00	-	-		195,920.00
Deferred Revenue - National Sponsors	44,809.95	-	-		44,809.95
Capital Lease Obligations	-	-	-		-
TOTAL LIABILITIES	\$ 1,817,041.04	\$ 368,493.90	\$ 395,155.50	\$ (130,031.95)	\$ 2,450,658.49
NET ASSETS					
Net Assets - Unrestricted	3,351,903.37	461,174.39	276,133.43		4,089,211.19
Net Assets - Temporarily Restricted	-	-	-		-
YTD Change in Net Assets	643,908.74	77,803.21	34,818.82		756,530.77
TOTAL NET ASSETS	3,995,812.11	538,977.60	310,952.25	-	4,845,741.96
TOTAL LIABILITIES & NET ASSETS	\$ 5,812,853.15	\$ 907,471.50	\$ 706,107.75	\$ (130,031.95)	\$ 7,296,400.45

Association of Chamber of Commerce Executives
Consolidated Statement of Activity
For the Year to Date Period Ending March 31, 2025

	March 25 YTD ACTUAL	2024-25 Annual Budget	Mar. 25 Actual vs. Budget YTD \$\$ Variance	Mar. 25 Actual vs. Budget YTD % Variance
FBI				
Total FBI Revenue	1,215,406.92	1,181,000.00	34,406.92	3%
Total FBI Expense	1,137,603.71	1,167,683.50	(30,079.79)	(3%)
FBI Net Income	\$ 77,803.21	\$ 13,316.50	\$ 64,486.71	484%
Foundation				
Total Revenue	1,372,799.59	1,336,276.00	36,523.59	3%
Total Expense	1,337,980.77	1,297,408.00	40,572.77	3%
Foundation Net Income	\$ 34,818.82	\$ 38,868.00	\$ (4,049.18)	(10%)
ACCE				
Revenue				
Annual Convention	1,005,554.80	1,178,400.00	(172,845.20)	(15%)
Awards/COY Revenue	28,200.00	30,000.00	(1,800.00)	(6%)
Certification	18,477.33	11,000.00	7,477.33	68.0%
Chamber Education	186,706.25	184,000.00	2,706.25	1%
Chamber Executive Magazine Rev	68,560.00	116,080.00	(47,520.00)	(41%)
Executive Search	8,190.44	10,000.00	(1,809.56)	(18%)
Executive Speaking Engagement	32,975.00	25,000.00	7,975.00	31.9%
Membership Revenue	1,604,889.71	1,570,000.00	34,889.71	2%
Metro Cities Revenue	62,982.00	81,500.00	(18,518.00)	(23%)
Misc Income	20,872.80	1,000.00	19,872.80	1,987%
National Corporate Sponsors Revenue	171,424.95	226,007.00	(54,582.05)	(24%)
Publications & Research Revenue	19,634.31	20,500.00	(865.69)	(4%)
Total ACCE Revenue from Operations	\$ 3,228,467.59	\$ 3,453,487.00	\$ (225,019.41)	(7%)
Expense				
Admin (Operations, Occupancy, Governance)	378,585.42	429,800.00	(51,214.58)	(12%)
Admin Personnel Costs	630,070.45	655,295.00	(25,224.55)	(4%)
Annual Convention	863,607.13	1,147,299.00	(283,691.87)	(25%)
Awards/COY Expense	45,776.03	46,064.00	(287.97)	(0.6%)
Certifications Expense	24,603.49	30,111.00	(5,507.51)	(18%)
Chamber Education Expense	226,467.87	217,761.00	8,706.87	4.0%
Chamber Executive Magazine Expense	49,651.84	52,528.00	(2,876.16)	(5%)
AskACCE	33,636.52	44,939.00	(11,302.48)	(25%)
Membership Expense	396,631.56	467,217.00	(70,585.44)	(15%)
Metro Cities Expense	45,850.97	45,267.00	583.97	1%
National Corporate Sponsors Expense	85,576.29	172,602.00	(87,025.71)	(50%)
Publications & Research Expense	73,226.66	75,298.00	(2,071.34)	(3%)
Web Expense	37,490.43	49,134.00	(11,643.57)	(24%)
Total ACCE Expense from Operations	\$ 2,891,174.66	\$ 3,433,315.00	\$ (542,140.34)	(16%)
ACCE Net Income from Operations	\$ 337,292.93	\$ 20,172.00	\$ 317,120.93	1,572%
Total ACCE & Affiliates Revenue	5,816,674.10	5,970,763.00	(154,088.90)	(3%)
Total ACCE & Affiliates Expenses	5,366,759.14	5,898,406.50	(531,647.36)	(9%)
Total ACCE & Affiliates Net Income	\$ 449,914.96	\$ 72,356.50	\$ 377,558.46	522%
Realized & Unrealized Gain/Loss from Investments	\$ 62,992.69			
Employee Retention Credit Revenue	477,388.13			
Employee Retention Credit Expenses - (102)	89,596.05			
Balance for ERC	\$ 387,792.08			
	<u>Actual</u>	<u>Budget</u>		
Original Opportunity Fund Allocation	600,000.00	600,000.00		
Board approved adding \$150,000 (Apr 24) to recoup pe	150,000.00	150,000.00		
Accrued Interest	14,129.09			
	\$ 764,129.09	\$ 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	8,974.59	50,000.00		
Total Budgeted Expenses from Investments	\$ 144,168.96	\$ 582,750.00		
Balance Remaining in Opportunity Fund	\$ 619,960.13	\$ 167,250.00		
ACCE Total Change in Net Assets	\$ 643,908.74			



ACCE Finance Report

Financial Statements for the Year Ended March 31, 2025

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 March, the current balance in this account is \$1.9 million, which exceeds that target goal.
- **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 March 2025 is \$620k 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 \$255k. This is primarily related to expenses for the Sales Training conference, advanced work on creation of a pilot training program and accrued employee benefits. Total net assets stand at \$4.8 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 Executive Magazine Revenue – This line item is lower than budget due to lower than anticipated National Corporate Sponsor revenue, and not achieving a \$20k target set by a senior team member no longer in the role, for stand-alone sponsorships and advertising. Following a 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 2% higher than the budget. This is primarily due to aggressive work on collections and sales efforts, as well as new automated member touchpoints.

Metro Cities Revenue – This line item is slightly lower than budget due to lower than budgeted attendance and sponsorship.

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.

Convention – Revenue for convention fell shy of budget. This was an aggressive goal and we were just shy on sponsors, exhibitors and registration. We recognized a net profit of approximately \$141K, more than four times the budgeted net revenue.

ACCE Expenses from Operations – Expenses for the fiscal year are lower than the budget. This is primarily due to an effort to monitor and align spending with revenue.

Net Income –ACCE’s net income for the fiscal year 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 March 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.

Association of Chamber of Commerce Executives
Consolidated Projects
For the Two Month Ending May 31, 2025

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	ACCE	FBI	Foundation	Eliminations	CONS
Consolidated Balance Sheet					
ASSETS					
Cash and Cash Equivalents	2,467,847.98	384,417.68	703,276.80		3,555,542.46
Investments	2,076,114.93	62,053.48	-		2,138,168.41
Investments - 457B	392,786.37	-	-		392,786.37
Investment in Subsidiary	461,049.64	-	-		461,049.64
Accounts Receivable - General (net)	33,344.23	141,541.96	829.26		175,715.45
Accounts Receivable - Trust	119.66	380,416.72	-		380,536.38
Grant Receivable	-	-	-	-	-
Due from Related Entities	255,132.26	-	-	(255,132.26)	-
Prepaid Expenses	141,403.86	32,836.65	-		174,240.51
Prepaid Expenses - Convention	209,653.88	-	-		209,653.88
Deposits	2,950.00	2,950.00	-		5,900.00
Fixed Assets, Net	61,772.01	27,371.69	-		89,143.70
Right of Use Asset	45,648.00	-	-		45,648.00
TOTAL ASSETS	\$ 6,147,822.82	\$ 1,031,588.18	\$ 704,106.06	\$ (255,132.26)	\$ 7,628,384.80
LIABILITIES					
Accounts Payable & Accrued Expenses	96,303.33	70,343.61	-		166,646.94
Accounts Payable - Trust	99.12	311,192.17	-		311,291.29
457B Liability	392,786.37	-	-		392,786.37
Due to Related Entities	-	100,712.83	154,419.43	(255,132.26)	-
Deferred Dues	778,304.96	-	-		778,304.96
Deferred Other	74,435.00	-	227,145.53		301,580.53
Lease liability	49,279.00	-	-		49,279.00
Deferred Convention	658,323.00	-	-		658,323.00
Deferred Revenue - National Sponsors	76,996.64	-	-		76,996.64
Capital Lease Obligations	-	-	-		-
TOTAL LIABILITIES	\$ 2,126,527.42	\$ 482,248.61	\$ 381,564.96	\$ (255,132.26)	\$ 2,735,208.73
NET ASSETS					
Net Assets - Unrestricted	3,995,812.11	538,977.60	310,952.25		4,845,741.96
Net Assets - Temporarily Restricted	-	-	-		-
YTD Change in Net Assets	25,483.29	10,361.97	11,588.85		47,434.11
TOTAL NET ASSETS	4,021,295.40	549,339.57	322,541.10	-	4,893,176.07
TOTAL LIABILITIES & NET ASSET	\$ 6,147,822.82	\$ 1,031,588.18	\$ 704,106.06	\$ (255,132.26)	\$ 7,628,384.80

Association of Chamber of Commerce Executives
Consolidated Statement of Activity
For the Year to Date Period Ending May 31, 2025

	May 25 YTD ACTUAL	May 25 YTD BUDGET	2025-26 Annual Budget	May 25 Actual vs. Budget YTD \$\$ Variance	May 25 Actual vs. Budget YTD % Variance
FBI					
Total FBI Revenue	204,038.56	218,542.00	1,311,252.00	(14,503.44)	(7%)
Total FBI Expense	193,676.59	203,293.83	1,219,763.00	(9,617.24)	(5%)
FBI Net Income	\$ 10,361.97	\$ 15,248.17	\$ 91,489.00	\$ (4,886.20)	(32%)
Foundation					
Total Revenue	124,483.33	191,807.83	1,150,847.00	(67,324.50)	(35%)
Total Expense	112,894.48	191,644.83	1,149,869.00	(78,750.35)	(41%)
Foundation Net Income	\$ 11,588.85	\$ 163.00	\$ 978.00	\$ 11,425.85	7,010%
ACCE					
Revenue					
Annual Convention	-	-	1,115,500.00	-	
Awards/COY Revenue	-	-	33,450.00	-	
Certification	400.00	-	15,750.00	400.00	
Chamber Education	21,213.00	20,000.00	282,500.00	1,213.00	6%
Chamber Executive Magazine Rev	17,635.00	17,500.00	80,510.00	135.00	
Executive Search	-	833.33	5,000.00	(833.33)	(100%)
Executive Speaking Engagement	-	-	25,000.00	-	
Membership Revenue	260,102.72	265,666.67	1,594,000.00	(5,563.95)	(2%)
Metro Cities Revenue	-	-	77,070.00	-	
Misc Income	6,447.93	4,166.67	25,000.00	2,281.26	55%
National Corporate Sponsors Revenue	13,339.97	12,987.00	205,480.00	352.97	3%
Publications & Research Revenue	1,298.00	3,333.33	20,000.00	(2,035.33)	(61%)
Total ACCE Revenue from Operations	\$ 320,436.62	\$ 324,487.00	\$ 3,479,260.00	\$ (4,050.38)	(1%)
Expense					
Admin (Operations, Occupancy, Governance)	69,913.65	72,594.23	387,565.40	(2,680.58)	(4%)
Admin Personnel Costs	77,881.13	102,018.85	660,113.11	(24,137.72)	(24%)
Annual Convention	-	-	1,070,918.46	-	
Awards/COY Expense	64.94	-	50,035.28	64.94	
Certifications Expense	4,403.75	2,901.02	27,806.15	1,502.73	52%
Chamber Education Expense	19,807.20	21,694.10	259,814.58	(1,886.90)	(8.7%)
Chamber Executive Magazine Expense	8,846.87	10,070.26	60,421.56	(1,223.39)	(12%)
AskACCE	8,266.64	8,616.35	51,698.07	(349.71)	(4%)
Membership Expense	78,451.27	81,517.00	489,101.99	(3,065.73)	(4%)
Metro Cities Expense	1,512.91	1,773.28	59,939.71	(260.37)	(15%)
National Corporate Sponsors Expense	16,144.12	39,680.25	238,081.52	(23,536.13)	(59%)
Publications & Research Expense	14,465.57	10,310.70	61,864.20	4,154.87	40%
Web Expense	4,813.73	10,192.87	61,157.21	(5,379.14)	(53%)
Total ACCE Expense from Operations	\$ 304,571.78	\$ 361,368.91	\$ 3,478,517.24	\$ (56,797.13)	(16%)
ACCE Net Income from Operations	\$ 15,864.84	\$ (36,881.91)	\$ 742.76	\$ 52,746.75	(143%)
Total ACCE & Affiliates Revenue	648,958.51	734,836.83	5,941,359.00	(85,878.32)	(12%)
Total ACCE & Affiliates Expenses	611,142.85	756,307.58	5,848,149.24	(145,164.73)	(19%)
Total ACCE & Affiliates Net Income	\$ 37,815.66	\$ (21,470.75)	\$ 93,209.76	\$ 59,286.41	(276%)
Realized & Unrealized Gain/Loss from Investm	\$ 9,618.45				
ACCE Total Change in Net Assets	\$ 25,483.29				



ACCE Finance Report

May 31, 2025, Financial Statements (2 months into the FY)

Balance Sheet

The ACCE Cash and Cash Equivalents line item on the Balance Sheet is made up of 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. The current balance in this account as of May is \$1.8 million, which exceeds that minimum.
- **Opportunity Fund** – Created 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.

In addition, we currently have \$2 million in short term/long term investments. Deferred Revenue for the Convention is up to \$658K and total net assets stand at \$4.8 million.

Consolidated Statement of Activity

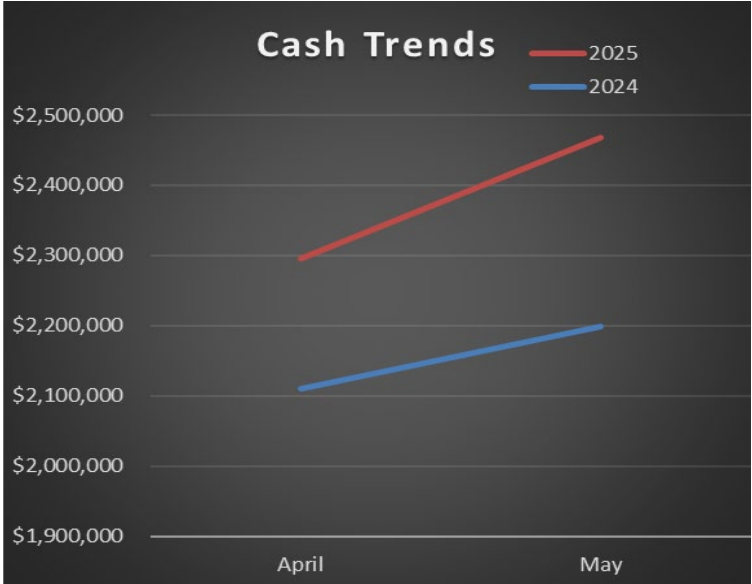
It is too early in the fiscal year to assess trends, as the majority of our largest revenue-generating programs start in July.

Membership Revenue – This line item is currently 2% lower than budget. Since the beginning of the calendar year, fiscal uncertainty has both delayed renewals and caused some chambers to drop membership so they can focus on core infrastructure. We’re seeing some cost-cutting across member organizations as they reassess discretionary expenses. This has primarily affected our smaller members. We have seen some renewals coming in just before membership expires, pushing revenue recognition later in the year. We are working to close the gap through ongoing engagement, recruitment and retention efforts.

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

Net Income – Two months into the year the ACCE net is better than budget. The Foundation is ahead of budget and FBI currently has a positive net income. The Foundation, which is dependent on grants, can vary significantly in its short-term revenue due to grant delivery.

Cash Flow – Cash flow as of May 2025 is strong.



Q2 Technology Update

Emma Griffin, Sr. Manager, Technology Projects

New Deferred Revenue Report: We created a new Deferred Revenue Report that is significantly more user-friendly and incorporates automated updates. This enhancement streamlines the monthly revenue reporting process, reducing the time Finance staff spend gathering data and improving the accuracy and timeliness of financial insights.

Drive Time Calculator: We developed a new internal tool that integrates with the Google Maps API to generate exportable lists of contacts within a specified distance from any location. This tool enables staff to identify regional contacts more efficiently, supporting more targeted outreach and increasing the effectiveness of our marketing efforts for regional meetings and events.

Spring Cybersecurity Training: Staff successfully completed the first of two required annual cybersecurity training sessions. This ongoing training reinforces our commitment to security awareness and risk reduction across the organization.

Legacy Server Decommissioning: We completed the decommissioning of legacy servers that hosted an outdated accounting application. This effort reduces operational costs and simplifies our IT environment, contributing to long-term cost savings and improved system security.

Professional Development Programs

Amy Shields, Vice President Programs

July 2025

Division Updates

Communications Division: In May, the division held a roundtable call focused on wins and challenges. Topics ranged from rebranding updates, project management software, technology updates, email cadence and marketing campaigns. The next division email is July 17 and the next roundtable call is August 14.

Economic Mobility and Opportunity Division: The division meets every other month on the third Tuesday. Recent discussion topics covered executive orders, adapting DEI language 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. Future programming includes webinars on student data and funding community impact initiatives. ACCE staff is conducting focus groups with economic and community development practitioners to understand needs and tailor programming moving forward.

Finance and Operations Division: The May division call focused on the Horizon 2035 Influence “Digital Transformation and Technological Innovation.” The call covered using AI as part of chamber operations and open discussion about other innovative tech tools the participants have found useful in their work. The division will meet in person at #ACCE25 for a roundtable session.

Government Relations Division: The division continues to hold calls on the fourth Thursday of the month. The April call featured Oriana Senatore, Senior Vice President of Strategy at the US Chamber’s Institute for Legal Reform (ILR), who discussed tort reform, lawsuit abuse and other ILR priorities. Other topics of recent calls included federal research funding and transportation grants, as well as strategies for creating a policy process that provides opportunities for member input, while also allowing the chamber to be nimble enough to act fast.

Membership Development Division: The division recently hosted two joint calls with the Economic Mobility and Opportunity Division on strengthening a chamber's membership base and retaining a diverse membership base. The July call provided an opportunity to discuss sales adaptability in the face of uncertainty and overcoming objections.

Other Professional Development Programming

Sales Contest and Lifetime Sales Achievement Awards: The 2025 Sales Contest is currently underway with 62 participants (view [Q1 leaderboard](#)). Participants will complete Q2 submissions by July 11. This year, [22 members will receive the Dana Ketterling Lifetime Sales Achievement Award](#), with 11 awardees planning to accept their awards in person at the annual convention in Philadelphia.

CCE Program: The 2025 class is the largest in ACCE history! The cohort has completed its essays and exams and is preparing for presentations and interviews that will take place in person in Philadelphia. In addition to recognizing the new class at the awards show and at the CCE breakfast at #ACCE25, several candidates are presenting during the “CCE Leadership Showcase” breakout session at Convention.

Chamber of the Year: This year, 12 finalist applicants will proceed to the interview round at the annual convention in Philadelphia.

New Chamber CEOs Cohort Program: ACCE is launching a new offering for chamber CEOs who have been in their roles for 18 months or less. The program, called the Propel Cohort Program, will provide opportunities for peer learning, professional development and mentorship from a seasoned chamber professional. Find an overview of the program [here](#).

Soft Skills Training for Chamber Members: ACCE and Pravi, a learning and development consulting firm, are developing soft skills training for chambers to sell to their member businesses. This product, called the Talent Academy, is being informed and piloted by the Greater Boston Chamber, the Dayton Area Chamber of Commerce and the Myrtle Beach Area Chamber of Commerce. Initial training modules are expected to launch in January 2026. Sign up [here](#) to stay informed.

Sales Coach Program: On April 15, the Sales Coach Program kicked off by pairing 19 new membership professionals with seasoned membership professionals for 6 months of peer-to-peer coaching.

Certificate in Chamber Management: So far in 2025, 110 CCM courses have been purchased, and 86 courses have been completed. There was a jump in enrollments as some of the CCE candidates used the CCM courses to help prepare for their exam. ACCE also released two new “Beyond the Basics” courses in the CCM program, one focused on [Government Relations](#) and one focused on [Economic Development](#).

Workforce Development Fundamentals Certificate: ACCE and IEDC wrapped up its third offering of the certificate and will host another offering this Fall. We are exploring additional opportunities for future webinars and certificate courses with IEDC.

Webinars and On-Demand Learning: New eCourses on [understanding public workforce data](#) and [building consensus](#) were released in the Spring. Upcoming webinar topics include scenario planning, the role of chambers in economic mobility, the case for skills-based hiring, and tourism as an economic driver.

ACCE Convention: The 2025 Convention features a strong track of breakout sessions and keynotes. Key changes to this year’s program include integrating Partner Solutions Sessions into the breakout sessions, inviting leaders from other industries to speak on the closing panel and experimenting with a new “solutions showcase” format for peer sharing. We anticipate slightly lower attendance this year due to economic uncertainty and continue to monitor trends as we begin to plan for the 2026 Convention in New Orleans.

ACCE Next Generation Leadership Program: The inaugural cohort of the NextGen program launched with 13 participants and held its first call on June 11, featuring our CEO as the guest speaker. Sheree Anne shared insights on Horizon 2035, the evolving role of chamber leaders, skills needed and leadership best practices. The cohort will meet in person for programming during convention and will begin 1:1 mentoring with a VP or CEO in July.

Regional Conferences and Topical Convenings

Save the date for upcoming conferences 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

Communications & Networks Report

Will Burns, Vice President – Communications & Networks

ACCE Communications

Chamber Executive: The Spring 2025 edition of Chamber Executive is [online](#). The issue features the latest trends in chamber membership. It also includes articles on research-driven talent attraction campaigns and Michigan West Coast Chamber's online community leadership and engagement platform. Sheree Anne Kelly's column highlights the importance of mental health and offers strategies for prioritizing one's well-being.

- **Membership Trends:** In the magazine's cover story, chamber membership professionals share the changing needs motivating businesses to join. The article also highlights how today's economic uncertainty is impacting members and the ways chambers are adapting to support their communities.
- **The Summer 2025** issue will be published in August and feature stories highlighting Chamber of the Year winners' high-impact programs and communication trends from this year's Award for Communications Excellence Best in Show. We'll also introduce the 2025 CCE class, explore the key elements of a chamber artificial intelligence policy and more.



Social Media Highlights: ACCE achieved growth on our social media channels during the last quarter. Total Follower Count across all channels is 21,436. Milestones: LinkedIn followers surpassed 6,000 and Facebook followers surpassed 8,000.

- LinkedIn: Follower count grew by 162 | Impressions increased 27% | Engagement rate increased 13.7% | Click through rate of 13.84%
- Facebook: Follower count grew by 88 | Impressions 255K, includes PAID Social (#ACCE25) | Engagement rate increased 38.6% | Click Through rate 5.66%
- Instagram: Follower count grew by 17 | Impressions grew 26.5% | Engagement rate increased 31.4%

Top Performing Posts - Facebook

-  2025 Membership & Revenue Photos
-  Staff Retreat Photo - Daytona
-  Membership Highlight - Triangle East Chamber
-  #ACCE25 Promotion

Top Performing Posts - LinkedIn

-  2024 Sales Contest Winners
-  Software Solutions Pulse Survey Results
-  Staff Retreat Photo - Daytona
-  #ACCE25 Promotion

Chamber Brand Campaign: We've launched 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 recruited a 20 member task force comprised of chamber CEOs and marketing and communication leaders to help with strategic direction. The task force is co-chaired by Conway Area Chamber President & CEO Brad Lacy, CCE and Greeley Area Chamber President & CEO Jaime Henning, CCE.

Research & Benchmarking

New Chamber Employee Engagement Survey: This quarter, ACCE concluded the first-ever chamber industry [Employee Engagement Survey](#). 29 ACCE member organizations representing a collective 450 staff participated in the program. Participating CEOs received detailed benchmarking reports, a custom data dashboard, staff development resources, a roundtable discussion to share best practices and peer sample

documents. For chambers that did not participate, a report will be available for purchase in July. The next opportunity to participate will be in Spring 2026.

Chamber Pulse Surveys: This quarter, ACCE gathered insights about [mergers and partnerships](#) as well as chamber executives' [economic outlook](#). Upcoming surveys will cover non-dues revenue, 501(c)(3) foundations and mental health. 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 April through June 2025, we responded to 111 [AskACCE requests](#). Satisfaction ratings averaged 4.5/5.0. Inquiries focused on:

- **Benchmarking:** Salary survey questions, compensation data, staffing metrics, retention rates
- **Non-Dues Revenue:** Digital certificates of origin, 501(c)(3) foundations, digital maps
- **Governance:** Sample bylaws, policies, committee charters, code of ethics, board surveys

Dynamic Chamber Benchmarking: 318 members participated in the FY2024 Salary Survey, up 15% from last year. The results are now open in [Dynamic Chamber Benchmarking](#). The newest [operations](#) and salary survey research publications are also available for purchase.



This fall, Dynamic Chamber Benchmarking will be updated to a more intuitive and modern user interface. The transition and refreshed support materials will be announced via email upon completion.

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

2025 Convention Meetings: During the ACCE Convention in Philadelphia, all CEO peer groups will meet on Thursday, July 24, at 2:45 p.m.

Metro Cities Council: ACCE's Metro Cities Council's June call focused on how businesses are navigating the current political and economic uncertainty and what impact that is having on their chambers. The group's next call will be held on September 25 at 3 p.m. ET. The group's fall in-person meeting will be held November 16-18 in Austin, Texas.

Major Cities Council: ACCE's Metro Cities Council's June call focused on how businesses are navigating the current political and economic uncertainty and what impact that is having on their chambers. The group's next call will be held on September 30 at 2 p.m. ET. The group's fall in-person meeting will be held November 2-4 in Plano and McKinney, Texas.

Emerging Cities Council: Emerging Cities Council continues to meet quarterly. Its May call focused on engaging young professional and tariffs. The council's Google Group remains a valuable resource for ideas and information-sharing among members. Topics of recent online discussions include policies for denying membership, exit surveys for dropped members and questions about the locations intelligence tool [placer.ai](#).

Hometown Chamber Council: The Hometown Chamber Council's June call focused chamber membership and revenue trends. The group's next call will be held September 10 at 3 p.m. ET. The council's Google Group remains a valuable resource for information-sharing among members. Recent threads focused on online vs printed membership directories and how to structure your board meetings.

Member Engagement & Partnerships
Ryan Keedy, VP Member Experience & Partnerships
July 2025

Membership Retention & New Sales:

- Between April and June, we welcomed 35 new members representing \$20,046 in new revenue
- Overall membership is currently tracking slightly behind budget. Since January 2025, fiscal uncertainty has both delayed renewals and caused some chambers to drop membership. Membership drops from January through April tracked slightly higher than we budgeted. This has primarily affected our smaller members. We have also seen some renewals coming in just before membership expires, pushing revenue recognition later in the year. We are working to close the gap through ongoing engagement, recruitment and retention efforts.

Partner, Convention and Regional Sponsorship Sales:

- Renewals: ACCE successfully renewed four valued partners:
 - Aventura World
 - CAEL
 - Citslinc
 - Comcast Business
- New Partner Acquisition: We welcomed Re:members as a new ACCE Partner during Q1
- Regional Sponsorship Update
 - Events & Communications Conference in the fall: Secured two Silver Sponsors; one Gold Sponsorship remains available.
 - Looking Ahead to 2026: Work is underway on sponsorship packaging and pricing strategy for next year's regional events to ensure early engagement and value alignment.
- 2024 Convention Sponsorship & Exhibit Sales
 - Sponsorship Revenue: Currently at 96% of goal, with strong retention and renewed interest across categories
 - Exhibitor Sales: We will likely be short of our convention exhibitor goal. Outreach continues, however we have seen a number of previous exhibitors passing due to economic uncertainty
 - Revenue Comparison (YTD): We set high goals for 2025, and are presently \$62,936 ahead in combined sponsorship and exhibitor revenue actuals compared to actuals from the same period for the 2024 Convention.

ACCE Foundation Updates

Amy Shields, Executive Director

July 2025

Governance and Operations

The ACCE Foundation has completed the second year of its three-year strategic plan. Highlights include assessing economic and community development programming, supporting chambers in growing their own foundations and building partnerships to support the Foundation's programmatic and fundraising efforts.

This year, the Foundation will focus on diversifying revenue streams and building additional programmatic offerings. We will also do preliminary work on the next Foundation strategic plan. This plan follows the ACCE strategic plan to ensure alignment across both organizations.

The Foundation wrapped up its nominations and will add five new members to its Board of Directors. The Foundation works to ensure that its board reflects different sizes and geographies and that the board includes Directors with expertise across the Foundation's areas of focus.

Programmatic Work

ACCE Foundation's Education and Talent Development Fellowship: [Applications](#) for the 11th cohort of this signature program are due August 8. Participants will develop plans to address a key education or talent challenge in their communities. The cohort will meet Nov. 13 – 14 in Alexandria, Va. For more information, [review our website](#).

Equitable Credential Attainment Cohort Program: The current cohort developed roadmaps for the future of this work and are wrapping up their last activities for this grant. The program will end this month, and the ACCE Foundation will release updates to its Equitable Credential Attainment toolkit in late summer. Staff are currently working with Lumina Foundation to determine next steps for this work.

Rural Workforce Development: This grant goes through summer 2025 and is funded by Ascendium Education Philanthropy. Communities are wrapping up their grants and planning for the future of this work. The team is currently in conversations to determine what follow-on work would look like for this grant.

Skills-Based Hiring: The May - June Complete Skills-Based Hiring Lifecycle series ended with four graduates. The next Lifecycle training starts August 7. The next Employer Accelerator for small and mid-sized businesses starts Sept. 18. Chambers who refer a business to participate will receive \$50 per participant. This work is funded by the Rework America Alliance, an initiative of Jobs for the Future.

Public Health: Staff continue to co-facilitate a community of practice on public-private partnerships to improve community health. Participants in this community of practice will meet this fall.

Career Pathways: The ACCE Foundation was recently awarded a grant to support chambers in identifying and expanding career pathways that lead to high wage jobs in their communities. This work is supported by the Truist Foundation. More information on how to participate will be available in early fall.

Work-Based Learning: The ACCE Foundation participated in 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. The Greater Boston Chamber and the Greater Cleveland Partnership participated in the first podcast, and the Vail Valley Partnership and the Chamber of Commerce of West Alabama were featured in the second podcast. Episodes are available on major podcast providers.

Development Pipeline and Partner Cultivation

Higher Education and Workforce Development

- Submitted a \$800K follow-on grant to the Kresge Foundation to continue supporting work on higher education ecosystems
- Submitted a \$1.8M LOI with Ascendium Education Philanthropy to discuss the next phase of the Economic Mobility for Rural Workers work
- Received a \$275K grant from Truist Foundation to provide career pathways technical assistance to chambers of commerce
- Submitted a \$250K concept for Lumina Foundation to explore public and business sentiment on the value of short-term credentials to better inform upskilling and reskilling efforts
- Finalizing a sponsorship from Strada Education Foundation
- Submitted a \$500K proposal for ECMC to offer workshops on building partnerships across higher education and business

Other

- 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

Fringe Benefits, Inc.

Candace Boothby, CCE, APR, GCCE, IOM, Chair

July 2025

The benefits team has wrapped up compliance season including the FBI team annual reviews and 2024 independent plan audit for the 401k plan. The changes we made to the annual 401k reviews revealed some new learnings and issues identified regarding the participating employer payroll systems. The team will be diving deeper into this through the remainder of the calendar year to ensure we have a thorough understanding of each payroll system and provide feedback to improve the process for administrators where appropriate.

We will also continue our 2024 pilot toward the conversion of all 401k plans to importing for employee data updates and contributions each pay period. This may decrease the amount of time each administrator spends on pay date submissions to Principal. More importantly, once each location is converted to importing it will help to reduce the administrative errors and unanticipated costs associated with fixing the errors. We will also work with the chambers and their payroll providers to ensure correct compensation data is provided to Principal at the final December pay date as part of the combined payroll deep-dive and importing projects.

We're pleased to be able to offer online insurance enrollment and termination forms. We've been able to identify and remedy potential challenges. We are hopeful that insurance plan administrators will be able to process online changes through the ACCE Member Portal before the end of the calendar year. As a reminder, the move to online insurance administration creates a better user experience for the plan administrator, better protection of employee data, and in time may create efficiencies for the FBI benefits team.

The Benefits Trust cybersecurity audit of FBI on 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. FBI and ACCE staff will continue to support this effort through our robust cybersecurity program that's in place.

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	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 and 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 business 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
Sheree Anne Kelly	May '25	St. Paul Area Chamber	Virtual	Presented on mergers to their Partnership Roadmap Committee
Sheree Anne Kelly	May '25	ASAE / Key Assoc. Industry Committee	Washington, DC	Committee meeting and peer-led roundtable; discussed pressing issues impacting trade associations
Sheree Anne Kelly	May '25	Eerie Regional Chamber	Virtual	Board presentation on the public opinion poll and the core services successful chambers are providing
Sheree Anne Kelly	May '25	American Immigration Council	Meeting	Discussed changes and policies impacting the business community
Sheree Anne Kelly	May '25	B2.0 Consulting	Meeting	Discussed best practices for chamber foundation work
Sheree Anne Kelly	May '25	Billings Chamber board retreat	Billings, MT	Facilitated strategic planning retreat
Sheree Anne Kelly	May '25	National Assoc. of Business Political Action Committees	Washington, DC	Panelist for Blue Ribbon Panel Discussion on evolving business and political landscapes
Ryan Keedy	May '25	The Herald Group Alliances & Coalitions Spring Reception	Washington, DC	Attendee
Sheree Anne Kelly	June '25	Babson College Executive Education	Meeting	Met with executive director to discuss partnership opportunities around entrepreneurship
Sheree Anne Kelly	June '25	Babson College	Webinar	Attendee: Thriving Amid Uncertainty: Entrepreneurial Leadership in a Rapidly Evolving World

Sheree Anne Kelly	June '25	North August Chamber	Virtual	Presented to board on The Horizon 2035 Report and the future of chambers
Sheree Anne Kelly	June '25	Greater St. Louis Inc.	Virtual	Presented to regional chambers on The Horizon 2035 Report
Sheree Anne Kelly	June '25	Save the Associations by XYZ University	Podcast	Guest on Associations Advancing Against All Odds
Sheree Anne Kelly & Amy Shields	June '25	Babson College	Meeting	Discussed partnership opportunities
Sheree Anne Kelly	June '25	Association Coalition for AI	Attendee	Quarterly meeting
Sheree Anne Kelly	June '25	U.S. Hispanic Chamber	Meeting	Meeting with CEO and senior staff on potential partnership opportunities
Rumsha Ahmed	June '25	Wichita Chamber Inclusion & Diversity Committee	Virtual	Presented on trends in economic mobility
Amy Shields	June '25	Apprenticeship 2.0	Podcast	Guest on two-part podcast on how chambers support apprenticeships
Amy Shields	June '25	UnidosUS	Virtual	Met to discuss skills-based hiring
Amy Shields & Rumsha Ahmed	June '25	CREC	Arlington, VA	Discussed potential partnerships and data sharing
Sheree Anne Kelly	July '25	Korn Ferry	Webinar	How to Lead with Resilience Amid Constant Change
Sheree Anne Kelly	July '25	Wilmington Chamber	Wilmington, NC	Presented to Chairman's Club members on The Horizon 2035 Report
Sheree Anne Kelly	July '25	Washington County Chamber	Hagerstown, MD	Facilitated strategic planning retreat
Sheree Anne Kelly	July '25	Save the Associations by XYZ University	Broadcast	Part 2: panelist for broadcast
Amy Shields	Jul '25	Achieving the Dream	Virtual	Discussed potential collaboration on foundation work
Amy Shields	Jul '25	Interise	Virtual	Discussed options for partnering on small business supports

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.