

Board of Directors Meeting

October 13, 2022
Washington, DC



ASSOCIATION OF
CHAMBER OF COMMERCE
EXECUTIVES

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Board of Directors Briefing Book

October 13, 2022

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ACCE Board of Directors Meeting

October 13, 2022 | 8:30 a.m. EDT

Washington, DC

AGENDA

- 7:45 a.m. Breakfast and Reconnecting**
- 8:15 a.m. Welcome and Introductions**
- 8:45 a.m. Federal Policy Implications on Small Businesses & How Local Chambers are Engaging**
Hear an update from ACCE strategic partner, META on national policy initiatives impacting small business and the role of chambers in these efforts.
- Presenter:
Victoria Luxardo Jeffries, *Global Head of Competition Policy, META*
- 8:55 a.m. Governance**
- Review and Approve Minutes – July 26, 2022 Meeting
 - Consent Agenda – New Members for Approval
 - Nominations – Open Board Seats
 - Treasurer’s Report
 - Financial Report
 - Investment Strategy Update
 - FBI Governance – Annual Stockholders Meeting
- 9:15 a.m. Foundation Update**
- 9:20 a.m. President’s Report**
- State of ACCE
 - Office Move Update
 - Annual Convention 2022 & 2023
 - Support Your Local Chamber Day – Oct. 19
 - Spring Board Meeting 2023
- 9:35 a.m. ACCE Strategic Plan 2023-2026**
- 9:50 a.m. Micro-session: Freemium Membership Models**
Hear from two chambers embracing a new membership model that allows for more businesses to engage in their work, reaching new constituencies.

Panelists:

Becky Bartoszek, *President & CEO, Fox Cities Chamber of Commerce*
Sara Ray, *President & CEO, Douglas County Chamber of Commerce*

10:15 a.m. **Break**

10:30 a.m. **The Current & Future State of America**

The U.S. has experienced unprecedented disruption, with many uncertainties that lie ahead. Hear from national thought leaders working with our city, county and state governments on current and emerging issues, challenges and opportunities that impact the success of our businesses and regions.

Panelists:

Matt Chase, *CEO/Executive Director, National Association of Counties (NACo)*
Tiffany Waddell, *Director of Government Relations, National Governors Assoc. (NGA)*

Facilitator:

Sheree Anne Kelly, *President & CEO, ACCE*

11:45 a.m. **Networking Lunch**

1:00 p.m. **The Current & Future State of the Economy**

Hear the latest statistics and factors impacting the economy, the likelihood of a recession, and what this means for the business community and global economy.

Presenter:

Andy Bauer, *Vice President & Regional Executive, Federal Reserve Bank of Richmond*

1:45 p.m. **Micro-session: Addressing Crime in New Orleans**

As chambers address a wider array of community issues, hear how the New Orleans Chamber is engaging in coalitions and addressing regional crime-related challenges.

Presenter:

Sandra Lindquist, *CCE, President & CEO, New Orleans Chamber of Commerce*

2:05 p.m. **Micro-session: Boston Chamber's Commitment to Board Diversity**

Hear how the chamber has crafted a diversity plan for its board based on data and how they're leveraging transparency to remain accountable for their outcomes.

Presenter:

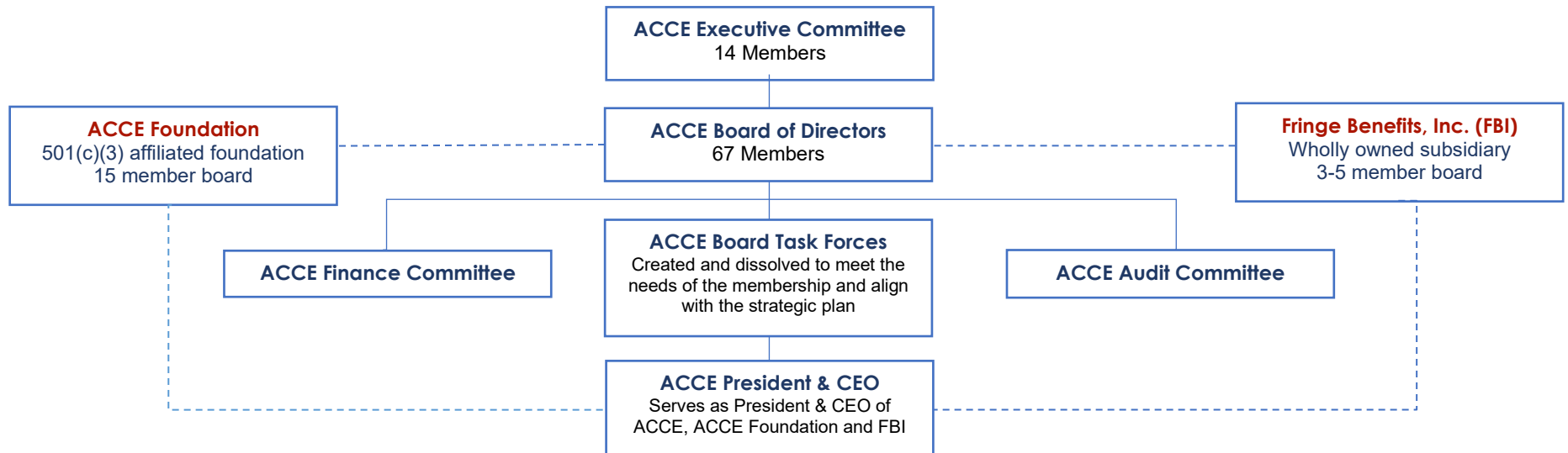
Jim Rooney, *President & CEO, Greater Boston Chamber of Commerce*

2:25 p.m. **Closing Remarks**

2:30 p.m. **Adjourn**



Governance Map



EXECUTIVE OFFICE & ADMINISTRATION



SHEREE ANNE KELLY
President & CEO



KAREN ROSE
Chief of Staff
Director of Administration



ASSOCIATION OF
CHAMBER OF COMMERCE
EXECUTIVES

ACCOUNTING & HUMAN RESOURCES



JACQUI COOK
CFO



SABRINA GONG
Senior Accountant



KIM NGUYEN
Director of Accounting

BENEFITS



STACEY BRESLIN
VP, Benefits Services



COLLEEN LOGAN
Manager, Benefits Services



SHONDA NORRIS
Benefits Services Associate

PARTNERSHIP & MEMBERSHIP



BETH BRONDER
VP, Development & Partnerships



ELLIE DUNAVANT
Coordinator, Partnership & Membership Development



KATE TEEL
Director, Membership

COMMUNICATIONS & NETWORKS



WILL BURNS
VP, Communications & Networks



TANIA KOHUT
Manager, Communications & Marketing



JEN PRUDEN
Manager, Resources & Benchmarking



LINDSEY SLATER
Director, Communications & Storytelling



JAMIE BARBACCIA
Information Specialist
Contractor

ACCE FOUNDATION, PROGRAMS & PROFESSIONAL DEVELOPMENT



AMY SHIELDS
ED, ACCE Foundation
VP, Programs



RUMSHA AHMED
Manager, Community
Impact Programs



EMMA GRIFFIN
Salesforce Manager

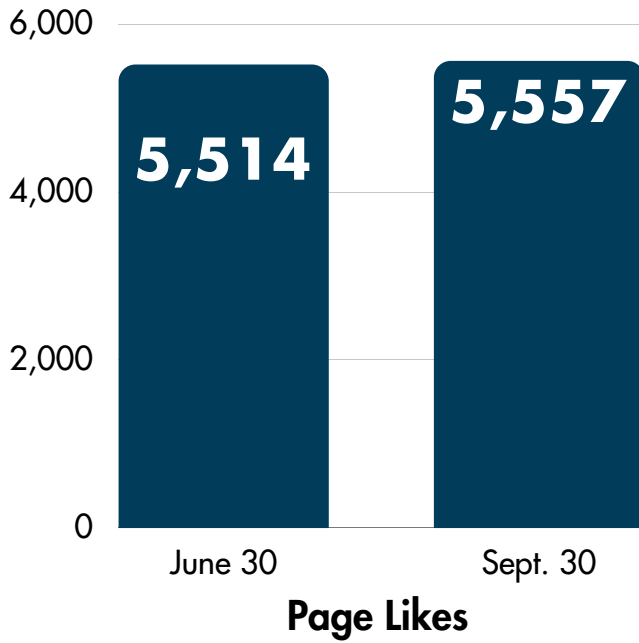


SUSAN MCGUIRE
Sr. Director, Professional
Development & Programs



SARA PERSING
Manager,
Professional Development

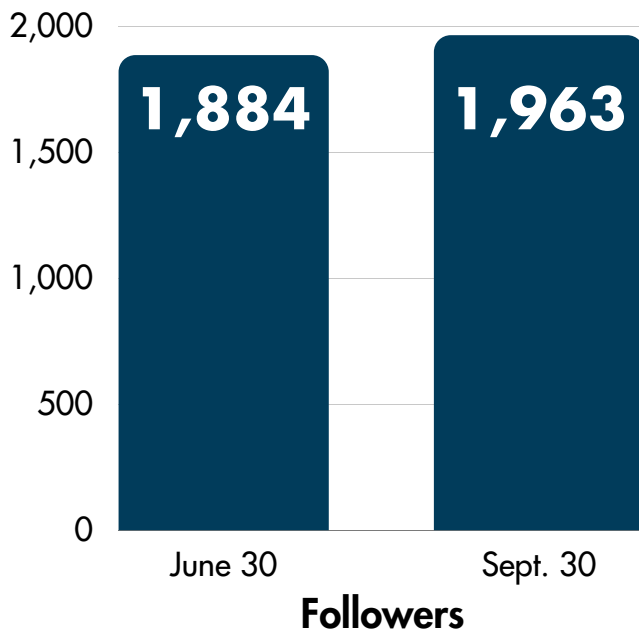
Q3 2022 ACCE SOCIAL REPORT



Page Reach
34,300
-7.5%*

Q3 Engagement
3,600
33%*

*Compared to Q2 2022



Post Reach
1,000
+40%*

*Compared to Q2 2022



Video Views

8,758

Since January 1

New Subscribers

+15

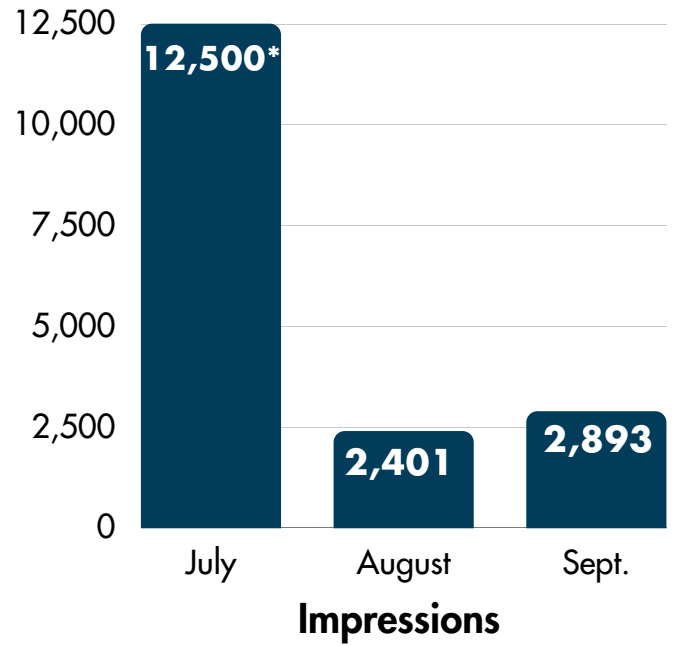
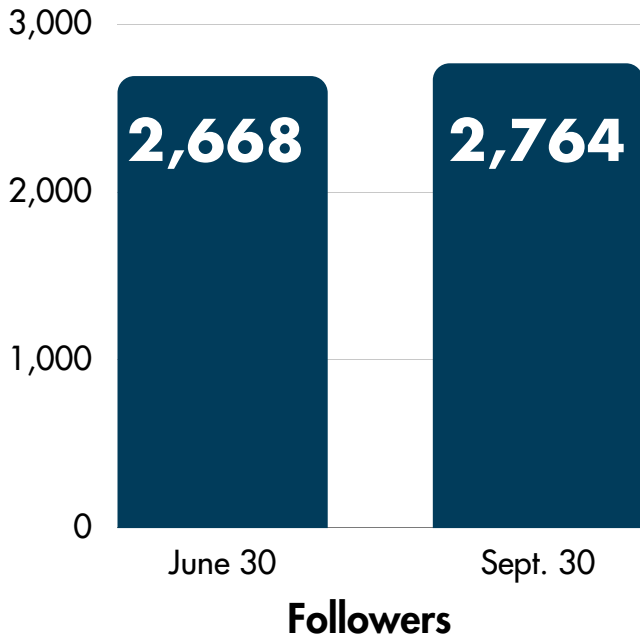
Total Current Subscribers: 689

Watch Time

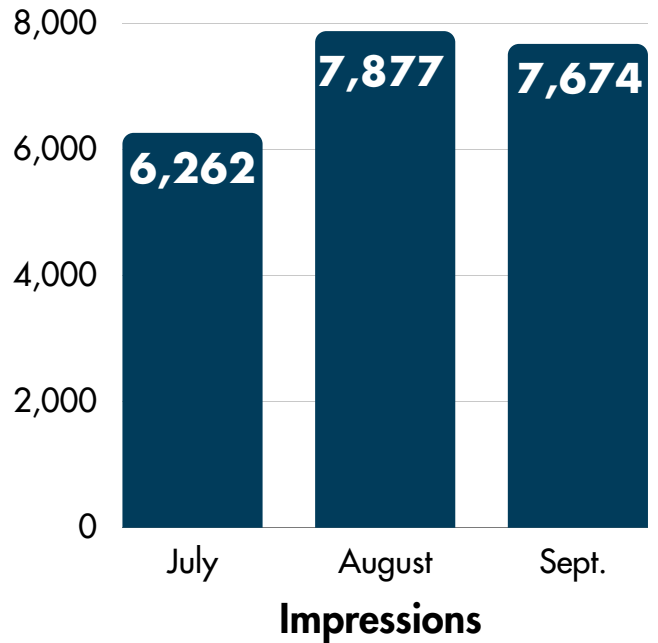
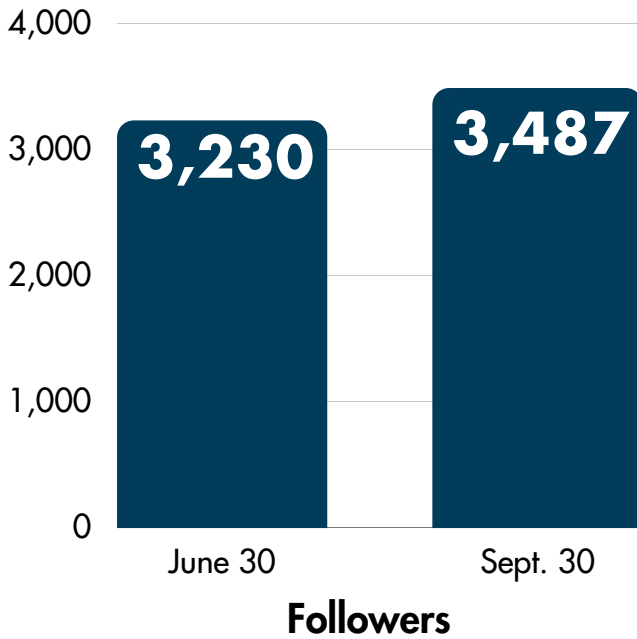
516 Hours

Since January 1

Q3 2022 ACCE SOCIAL REPORT



*This is a "convention bump." We shared via email that we would live-tweet the Awards Show and had great interaction all week.



Analysis: The annual convention bump really showed up on Twitter, where we were live-tweeting events at the convention, and Instagram, where we were very active in sharing attendees' posts via Stories. Facebook engagement remains higher overall and had an excellent bump during the Awards Show. LinkedIn strategies include more native content, as we share blog posts as LinkedIn articles instead of linking back to the acce.org site. Strategies and best practices continue to evolve.

ACCELERATE

JULY 26-29 2022
acceconvention.com

INDY

By the Numbers

Social Snapshot
Whova App Engagement
Partnership Success



Social Snapshot

Compared to the 2021 Virtual Summit, our social channels performed as well or better during this year's in-person event. The exception was Twitter, which had a much higher reach during last year's summit, specifically during the Awards Show and announcement of Chamber of the Year winners.

JULY 24-30

FACEBOOK

19,134 / TOTAL REACH

Increase of 1900% compared to previous week

1,357 / PAGE VISITS

Increase of 1400% compared to previous week

INSTAGRAM

634 / TOTAL REACH

Increase of 700% compared to previous week

JULY 1-31

LINKEDIN

6,150 / IMPRESSIONS

TWITTER

12,500 / IMPRESSIONS

Increase of 800% compared to previous month

205 / MENTIONS

Increase of 1300% compared to previous month

Top Post



Top Tweet



ACCE
@ACCEHQ

Congratulations to Beverly Robertson, the president & CEO of the [@MemphisChamber](#), on being honored with this year's Chairman's Award. #ACCE22



Whova APP ENGAGEMENT

The Whova app was a great tool to enhance the experience of #ACCE22. Before the event, it provided website pages for both speakers and the agenda. At the event, the app was used by 86% of attendees to create personalized agendas, network with other attendees, connect with sponsors and exhibitors and more. ACCE staff heard outstanding feedback about the app.

86% ATTENDEE
DOWNLOAD RATE

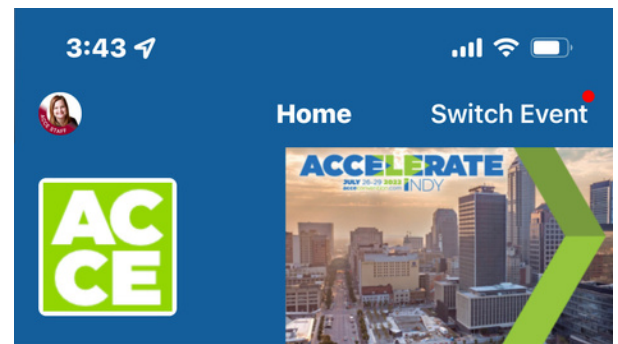
54 DISCUSSION TOPICS
LED TO 1,959 RESPONSES

30 MEETUPS CREATED
BY ATTENDEES

8,049 MESSAGES SENT

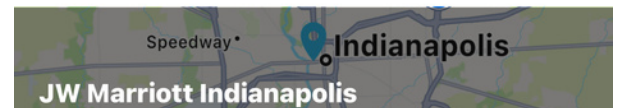
4,300
AGENDA WEBPAGE VISITS

20,400
AGENDA IN-APP VIEWS



#ACCE22 Convention

Indianapolis, IN
Jul 26 - 29, 2022



Admin Tools

[View as attendee](#)

- Announcements & Reminders >
- Attendee Check-in >
- Promote Your Event >
- Reports >
- Moderation Tools >
- Organizer Tips >

[Corporate](#)

COMCAST

COMCAST
BUSINESS

- Home
- Agenda
- Attendees
- Community 754
- Messages 38



THE
CIRCUIT
INDY 2022

**PARTNERSHIP
SUCCESS**

977,576

SPONSOR IMPRESSIONS

925

EXHIBITOR LEADS

3,100+

BOOTH VISITS

769

EXHIBITOR PROMOTIONS
CLAIMED BY ATTENDEES



ACCE Board of Directors Meeting

July 26, 2022 | 2:30 p.m. EDT
Indianapolis, IN

MINUTES

Present: Juliet Abdel, Brian Anderson, Sara Armstrong, Linda Ashworth, Becky Bartoszek, Amber Batchelor, Jason Benitez, Alisha Benson, Carl Blackstone, Kathy Blank, Beth Bowman, Katy Brooks, Jay Byers, Adrian Cain, Kim Casco, Chip Cherry, Omar Cuevas, Greg Durocher, Natalie English, Ian Fletcher, Barbara Jean Garza, Christy Gillenwater, Eric Godet, David Griggs, Joshua Gunn, Brian Hall, Robert Heidt, RaDonna Hessel, Michael Huber, Pammie Jimmar, Andy Johnston, Todd Letts, Sandra Lombana Lindquist, Megan Lucas, Kelle Marsalis, Matt McCormick, Matt Morrow, Jim Page, Amanda Payne, Carlos Phillips, Matt Pivarnik, Brittany Quick-Warner, Sara Ray, Joe Reardon, Beverly Robertson, Jim Rooney, David Rumbarger, Mary Beth Sewald, Kevin Sheilley, Vern Squier, Sherry Taylor, Tony Vedda, Allison Walden, Ashli Watts, Angie Whitcomb and Sandra Wilson.

Excused: Hamad Buamim, Kati Capozzi, Terra Carroll, Doris Carson Williams, Adrienne Cole, Tiffany Esposito, Dottie Gallagher, Kris Johnson, Adam Knapp, Brad Lacy, Michel Leblanc, Adam Marshall, Lori Mattson, Sherry Menor-McNamara, Derek Miller, Rachel Morris, Nicole Quiroga, Jeff Rea, Bob Rohrlack, Natalie Rubalcava, Maria Salinas, Todd Sanders and Bryan Starr.

Staff: Sheree Anne Kelly, Stacey Breslin, Beth Bronder, Jacqui Cook and Karen Rose

Chair Chip Cherry called the meeting to order and welcomed all to Indianapolis. Convention host Michael Huber welcomed everyone to Indy and shared more about the week ahead.

Cherry recognized Natalie English for 25 years of service in the chamber industry. English received a certificate and pin. Kris Johnson, unable to attend the meeting, was also recognized for this milestone.

Cherry welcomed and introduced new board members.

The board reviewed the minutes from the April 20, 2022 meeting. A motion to accept the minutes was made by Natalie English and seconded by Joe Reardon. *Motion carried.*

Cherry then presented the consent agenda of new members for approval since our last meeting. A list is included in the briefing materials. A motion to approve the new members was made by Megan Lucas and seconded by Matt McCormick. *Passed.*

Cherry called on Treasurer Alisha Benson for the year-end financial report. She noted that our cash position is positive and strong, with \$3.8 million in total net assets. Membership revenue is above budget and operational expenses are lower than budget due to paused spending on select infrastructure investments. Revenue from the virtual Summit exceeded expectations and had strong attendance, with sponsorship/partnership support coming in very close to budget. Overall, this year's Summit yielded a strong profit and net positive variance compared to budget. Net income for ACCE, the foundation and FBI exceeds budget. Angie Whitcomb made a motion to approve the financial report which was seconded by Kelle Marsalis. *Passed.*

Benson then presented the finance report through May 31, 2022. ACCE's cash position is \$4.3 million. Total net assets are \$3.9 million. Membership revenue is positive and most expenses for the first two months of the fiscal year are below budget. ACCE and FBI are ahead of budget. The foundation currently has a negative net

income, but the long term financial picture is strong. A motion to approve the finance report was made by Tony Vedda and seconded by Jim Page. *Passed.*

Anna Behnam with Behnam & Associates joined the meeting virtually to provide an overview and share the next steps for ACCE's new investment strategy plan. A motion to approve the plan was made by Matt Morrow and seconded by RaDonna Hessel. *Passed.*

Cherry called on Nominating Committee Chair Jay Byers for an update. Byers thanked members of nominating committees and shared his confidence in the line-up for the coming year. He presented the slate of officers and made a motion to approve. Matt Pivarnik seconded the motion; there were no nays. *Passed.*

Byers moved on to the Board Nominating Committee. He noted that the due diligence process was very thorough, and a number of self-nominations were submitted and considered. The electronic ballot was sent out in mid-June and closed on July 5. The slate was approved by the membership.

Byers noted that the personnel committee convened, and CEO Kelly has had an annual review. Kelly will draft goals for the year ahead with incoming Chair Christy Gillenwater.

Matt McCormick presented the 2022 class of CCEs and commissioners and made a motion to approve the CCE candidates which was seconded by Jim Rooney. *Passed.* McCormick noted that Megan Lucas will succeed him as chair of the CCE Commission.

As outgoing chair, Cherry reflected on the challenges, insights and strides made during a year of trying times.

Cherry congratulated incoming Chair Christy Gillenwater, who shared her thoughts and goals for the year ahead.

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

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

Foundation Chair Ian Fletcher provided a report on the foundation.

Chair Cherry recognized departing officers and board members and thanked them for their service.

Cherry made closing remarks. *Meeting adjourned.*

New or Reinstated Members for Approval

Organization

EOS Worldwide
Chamber Directory Services, Inc.
Boone County Chamber of Commerce
Cocoa Beach Chamber of Commerce
Madison County Chamber of Commerce
Greenville (TX) Chamber of Commerce
Grand Prairie Chamber of Commerce
Chamber of Commerce of Southern New Jersey
St. Clair County Economic Development Council
Greater Pharr Chamber of Commerce
Almosa County Chamber of Commerce
Greater Lafayette Commerce
Hastings Area Chamber of Commerce & Tourism Bureau
Greater Farmington Area Chamber of Commerce
Chamber Speak
Funding Solutions, Inc.
Greater West Plains Area Chamber of Commerce
Eastman – Dodge County Chamber of Commerce
Laurentian Chamber of Commerce
Central Maryland Chamber of Commerce
Stillwater Chamber of Commerce
Farragut West Knox Chamber of Commerce
Great Bend Chamber of Commerce & Economic Development
Greater Greenwich Chamber of Commerce
Newark Chamber of Commerce
Goochland Chamber of Commerce
Greater Sandhills Chamber of Commerce
Greater Dover Chamber of Commerce
Navarre Beach Area Chamber of Commerce
Northern Virginia Black Chamber of Commerce
Valor Manufacturing Training
Experience Sioux Falls
GSBA
Jacksonville Chamber of Commerce
Cleveland - Bolivar Chamber of Commerce
Washington County Chamber of Commerce
Frankfort Chamber of Commerce
Madison Chamber of Commerce
Prosper Chamber of Commerce
Cache Chamber of Commerce

**Association of Chamber of Commerce Executives
Consolidated Projects
For the Five Months Ending August 31, 2022**

JC-09CONSBS
Page 1

	ACCE	FBI	Foundation	Eliminations	CONS
Consolidated Balance Sheet					
ASSETS					
Cash	2,569,462.21	\$762,931.65	\$1,137,873.80		\$4,470,267.66
Investments	492,815.36	\$0.00	\$0.00		\$492,815.36
Investments - 457B	218,465.72	\$0.00	\$0.00		\$218,465.72
Investment in Subsidiary	530,990.23	\$0.00	\$0.00		\$530,990.23
Accounts Receivable - General (net)	111,781.83	\$98,570.81	\$0.00		\$210,352.64
Accounts Receivable - Trust	0.00	\$0.00	\$0.00		\$0.00
Grant Receivable	0.00	\$0.00	\$0.00		\$0.00
Due from Related Entities	704,023.60	\$0.00	\$0.00	(704,023.60)	\$0.00
Prepaid Expenses	70,822.41	\$20,630.22	\$2,888.58		\$94,341.21
Prepaid Virtual Summit	0.00				\$0.00
Prepaid Expenses - Convention	0.00	\$0.00	\$0.00		\$0.00
Deposits	11,312.12	\$975.00	\$0.00		\$12,287.12
Fixed Assets, Net	164,810.64	\$59,428.94	\$0.00		\$224,239.58
TOTAL ASSETS	\$4,874,484.12	\$942,536.62	\$1,140,762.38	(\$704,023.60)	\$6,253,759.52
LIABILITIES					
Accounts Payable & Accrued Expenses	460,651.81	\$0.00	\$509.50		\$461,161.31
Accounts Payable - Trust	3,345.21	\$0.00	\$0.00		\$3,345.21
457B Liability	218,465.72	\$0.00	\$0.00		\$218,465.72
Due to Related Entities	0.00	\$414,095.87	\$289,927.73	(704,023.60)	\$0.00
Deferred Dues	656,436.19	\$0.00	\$0.00		\$656,436.19
Deferred Other	19,907.00	\$141.05	\$612,040.46		\$632,088.51
Deferred Rent	93,554.75	\$0.00	\$0.00		\$93,554.75
Deferred Convention	0.00				\$0.00
Deferred Revenue - National Sponsors	27,327.46				\$27,327.46
Deferred Revenue - Convention	0.00				\$0.00
Note Payable	0.00	\$0.00	\$0.00		\$0.00
Capital Lease Obligations	15,026.00	\$0.00	\$0.00		\$15,026.00
TOTAL LIABILITIES	\$1,494,714.14	\$414,236.92	\$902,477.69	(\$704,023.60)	\$2,107,405.15
NET ASSETS					
Net Assets - Unrestricted	3,043,452.35	\$537,446.75	\$236,221.05		\$3,817,120.15
Net Assets - Temporarily Restricted	0.00	\$0.00	\$0.00		\$0.00
YTD Change in Net Assets	336,317.63	(\$9,147.05)	\$2,063.64		\$329,234.22
TOTAL NET ASSETS	\$3,379,769.98	\$528,299.70	\$238,284.69	\$0.00	\$4,146,354.37
TOTAL LIABILITIES & NET ASSETS	\$4,874,484.12	\$942,536.62	\$1,140,762.38	(\$704,023.60)	\$6,253,759.52

Association of Chamber of Commerce Executives
Consolidated Statement of Activity
For the Year to Date Period Ending August 31, 2022

	August 22 YTD ACTUAL	August 22 YTD Budget	2022-23 Annual Budget	August 22 Actual vs. Budget YTD \$\$ Variance	August 22 Actual vs. Budget YTD % Variance
FBI					
Total FBI Revenue	451,805.48	450,416.67	1,081,000.00	1,388.81	0%
Total FBI Expense	460,952.53	507,315.00	1,217,556.00	(46,362.47)	(10%)
FBI Net Income	(9,147.05)	(56,898.33)	(136,556.00)	47,751.28	(522%)
Foundation					
Total Revenue	515,281.30	512,636.67	1,230,328.00	2,644.63	1%
Total Expense	513,217.66	500,065.83	1,200,158.00	13,151.83	3%
Foundation Net Income	2,063.64	12,570.83	30,170.00	(10,507.19)	(509%)
ACCE					
Revenue					
Annual Convention	1,111,479.46	1,049,725.00	1,049,725.00	61,754.46	6%
Awards/COY Revenue	14,300.00	17,500.00	50,000.00	(3,200.00)	(22%)
Certification	750.00	1,000.00	11,000.00	(250.00)	(33%)
Chamber Education	12,167.00	10,000.00	87,400.00	2,167.00	18%
Chamber Executive Magazine Rev	39,435.00	37,080.00	108,640.00	2,355.00	6%
Economic Development	0.00	0.00	5,000.00	0.00	0%
Executive Search	5,309.26	7,500.00	18,000.00	(2,190.74)	(41%)
Membership Revenue	661,345.91	615,000.00	1,476,000.00	46,345.91	7%
Metro Cities Revenue	375.00	0.00	68,075.00	375.00	100%
Misc Income	27,409.30	833.33	5,000.00	26,575.97	97%
National Corporate Sponsors Revenue	167,364.15	167,920.00	294,360.00	(555.85)	(0%)
Publications & Research Revenue	1,308.96	4,166.67	26,000.00	(2,857.71)	(218%)
Total ACCE Revenue from Operations	2,041,244.04	1,910,725.00	3,199,200.00	130,519.04	6%
Expense					
Admin (Operations, Occupancy, Governance)	215,871.17	221,531.67	531,676.00	(5,660.50)	(3%)
Admin Personnel Costs	202,445.98	233,555.42	560,533.00	(31,109.44)	(15%)
Annual Convention	891,469.50	948,730.00	948,730.00	(57,260.50)	(6%)
Awards/COY Expense	53,694.35	55,448.00	55,448.00	(1,753.65)	(3%)
Certifications Expense	7,654.21	10,227.92	24,547.00	(2,573.71)	(34%)
Chamber Education Expense	33,632.75	41,251.50	165,006.00	(7,618.75)	(23%)
Chamber Executive Magazine Expense	29,264.84	28,998.00	57,996.00	266.84	1%
Divisions Expense	6,735.88	4,800.42	11,521.00	1,935.46	29%
AskACCE	9,515.33	13,845.75	55,383.00	(4,330.42)	(46%)
Membership Expense	158,933.22	175,335.42	420,805.00	(16,402.20)	(10%)
Metro Cities Expense	2,937.83	3,113.00	37,356.00	(175.17)	(6%)
National Corporate Sponsors Expense	69,615.21	69,560.83	166,946.00	54.38	0%
Publications & Research Expense	8,997.01	10,206.50	61,239.00	(1,209.49)	(13%)
Web Expense	14,159.13	23,046.25	55,311.00	(8,887.12)	(63%)
Total ACCE Expense from Operations	1,704,926.41	1,839,650.67	3,152,497.00	(134,724.26)	(8%)
ACCE Net Income	336,317.63	71,074.33	46,703.00	265,243.30	79%
Total ACCE & Affiliates Revenue	3,008,330.82	2,873,778.33	5,510,528.00	134,552.49	7%
Total ACCE & Affiliates Expenses	2,679,096.60	2,847,031.50	5,570,211.00	(167,934.90)	(15%)
Total ACCE & Affiliates Net Income	329,234.22	26,746.83	(59,683.00)	302,487.39	23%

ACCE Finance Report August 31, 2022 Financial Statements (5 months into the FY)

Balance Sheet

Our cash position is strong with over \$4.4 million. However, with counsel from our new financial advisor, we will invest a significant portion of our cash into the board-approved investment vehicles in October. ACCE's accounts payable is \$460k. Included in this line item is the hotel bill for the ACCE convention. Total net assets are standing at \$4.1 million.

Consolidated Statement of Activity

Year-to-date performance is very strong for ACCE and its affiliates.

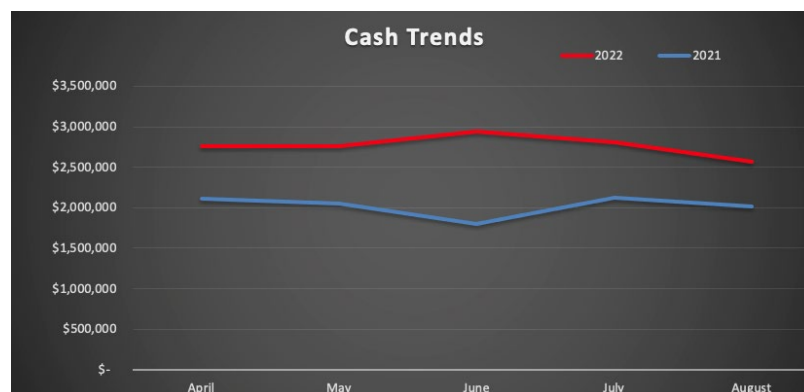
Membership Revenue – ACCE membership is 7% above budget. This is thanks to the aggressive collections and sales efforts, paired with new recruitment and retention plans built by our membership team.

Convention – This year's convention was well received and well attended. Please note that the financials you see from August are not yet final, as we're awaiting additional expense invoices. Attendance was stronger than the last two in-person conventions. We budgeted a relatively aggressive registration revenue figure, and we met that target. Our sponsorship funding exceeded goal, as we were able to capitalize on demand from sponsors who were waiting for our return to in-person events. While costs rose significantly this year, particularly for food, beverage and travel, we were able to control expenses without reducing the quality of the conference, resulting in a net positive variance compared to budget. We will 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 and 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 in its short-term revenue due to grant delivery. Foundation funding for the next seven months looks strong.

Cash Flow Trends Year-Over-Year – ACCE is in a strong position regarding cash flow, with increased revenue compared to last year due to improved collections processes and automations, general economic recovery, membership performing above budget, and the full return to in-person programming.



Professional Development Update

Susan McGuire, Sr. Director
October 2022

CCE Program

At the 2022 Convention, we presented a CCE process workshop for 30 prospective CCE candidates. We also honored our 2022 CCE class at the annual awards ceremony and at our CCE breakfast, which featured our new class and the innovative work they are doing in their communities.

Applications for the 2023 CCE class are due on January 9, 2023. Our fall outreach and marketing campaign includes an [informational CCE workshop webinar](#) led by CCE Commission leadership. Our “Meet the CCE” video campaign also features advice and encouragement from our newest CCEs. Marketing also includes regular communications and individual outreach by ACCE staff and CCE commission volunteers. We continue to review and revise our exam, recommended reading, and other resources. If you know of a good candidate for the CCE, contact Susan McGuire at smcguire@acce.org.

E-learning

Online learning this fall includes webinars on strategies to sell high-level investments, award-winning initiatives via chamber videos, marketing campaigns and websites, innovative non-dues revenue opportunities, offerings through chamber peer networks and councils, and policy efforts for affordable housing.

Four remaining courses within our on-demand [Certificate in Chamber Management program](#) are scheduled to launch in late 2022 and early 2023, completing the seven-course program. These new courses will cover Events, Programs & Communications; Community Leadership & Advocacy; Diversity, Equity & Inclusion; and Your Chamber Career. These courses supplement the three courses already available on [Operations & Finance](#), [Governance & Planning](#), and [Membership & Revenue Development](#).

Over 400 professional development programs from in-person and virtual conferences, webinar recordings, division roundtable calls, eCourses, and ACCE publications are available on demand in our [learning portal](#).

Communications & Networks Report

Will Burns, Vice President – Communications & Networks

ACCE Communications

Chamber Executive: The [Summer 2022 edition](#) of *Chamber Executive* is online. The issue focused on award-winning chamber programs and featured articles that highlight this year's Chamber of the Year winners' high-impact programs, Awards for Communications Excellence winners, 2022 CCE class profiles, a Q&A with chamber membership and sales professionals, as well as lessons learned from the ACCE Foundation's year-long Fellowship for Inclusive Economic Growth.

- The Fall 2022 issue will be published in November and showcases the 2022 40 Under 40 winners, along with stories highlighting trends in key areas of chamber operations.



Support Your Local Chamber of Commerce Day: Support Your Local Chamber of Commerce Day is Wednesday, October 19. ACCE has created an asset library with social media graphics, a 60-second video and a proclamation template for chambers to utilize. Chambers are encouraged to use #ChamberStrong along with their posts. ACCE also shared a [blog post with ideas on how to celebrate](#).



40 Under 40: Nominations are open for the [2022 ACCE 40 Under 40](#). Here is your opportunity to [recognize a colleague or employee](#) for their creativity and dedication to their community. Winners will be highlighted in the November 2022 issue of *Chamber Executive* magazine.

Research & Benchmarking

New Team Member: ACCE welcomed Jen Pruden as its new communications manager, research and benchmarking. She will lead the association's efforts to streamline and enhance our Dynamic Chamber Benchmarking surveys and generate custom research and reports on vital chamber industry issues. She joins the team from ALSAC, the fundraising and awareness arm of St. Jude Children's Hospital.

Dynamic Chamber Benchmarking: All chambers that completed our operations and salary surveys now have free access to dynamic online reports to help evaluate, benchmark and improve operations. Chamber leaders rely on this data to inform strategic planning, make the case for adjusting staffing levels and salaries,

and to track key metrics over time. [Here are a few examples](#). Access the reports on the [benchmarking platform here](#).

AskACCE: The team continues to provide Q&A and in-depth research services. For July through September 2022, we responded to 136 requests into AskACCE@acce.org, with 85% of the requests being answered and closed within 24 hours. Interesting themes from inquiries included:

- Operations and HR Topics, like requests for sample job descriptions, workplace flexibility, salary benchmarking and employment manuals
- Non-dues revenue ideas to leverage 501(c)(3) foundations, fee-for-service opportunities and creative event ideas
- Questions about chamber-run incubators and innovation labs

Community Peer Groups

Metro Cities Council: The Metro Cities Council's convention meeting focused on increased corporate engagement on social issues and what policies chambers are putting in place to take positions or make statements on more controversial issues. The group also discussed the role of chambers in helping their business communities navigate partisan polarization and political disruption. The group's September call featured a discussion on election activities as well as crime and public safety initiatives. A joint Metro Cities & Major Cities Council meeting will be held **Nov. 2-4 in Charleston, SC**. The group's Q1 2023 meeting will take place **March 12-14 in Dallas**.

Major Cities Council: The Major Cities Council convention meeting featured a discussion of internal operations, staffing and personnel issues. The group's September call focused on revenue topics – both membership and non-dues revenue initiatives. A joint Metro Cities & Major Cities Council meeting will be held **Nov. 2-4 in Charleston, SC**. Details of the group's Q1 2023 meeting will be announced soon.

Emerging Cities Council: Following up on a lively in-person discussion at ACCE's convention, we kicked off the September roundtable featuring a round-robin sharing of challenges and responses to workforce and talent needs of our communities. Our next call is scheduled for **November 29**. Our group continues to grow in membership, and its Google Group remains a valuable resource for additional idea and information sharing among members.

Hometown Chamber Council: The Hometown Chamber Council's meeting at ACCE's convention focused on chamber opportunities and challenges. Its September call featured a discussion on non-dues revenue trends. The next call will be held in November. The council's Google Group remains a valuable and active resource among members. Recent threads focused on strategic planning facilitators and capital campaigns.

Divisions

Membership Development Division (MDD): Our fall roundtable kicked off with a discussion on career planning for chamber professionals. We'll continue with roundtables led by division advisory board members throughout the fall, capped off by a December "Coffee and Connections" event featuring informal networking opportunities. Fall peer learning opportunities will also include webinars on selling higher level investments, non-dues revenue opportunities, and peer councils and networks.

Over 30 sales professionals participated in our 2022 Sales Coach program, which concluded in late summer. Plans for our 2023 coach program are underway. The division advisory board continues to provide our team with critical support and advice.

Communications Division: The Communications Division met in person at this summer's annual convention, with about 40 in attendance for an open discussion. At the third quarter roundtable call, the group discussed topics including ADA-compliant websites, communicating pricing for events, how to reach non-members, QR codes and leadership programs. Communications topics and an in-person division

meeting have also been added to this year's fall regional conference, the **Events & Communications Conference in Boulder on October 10-12**.

Diversity, Equity & Inclusion Division: The division continues to host monthly calls and webinars, with topics such as fall priorities and tracking progress on action plans. Greater St. Louis Inc. is hosting the DEI Practitioners Meeting from **Oct. 17-19 in St. Louis**. Future calls will discuss memoranda of understanding with identity-focused chambers and how small-staffed chambers can be involved with DEI.

Economic & Community Development Division: The division meets for quarterly calls and webinars. Upcoming programs will focus on the future of work and workplaces and affordable housing. Registration has opened for the Talent and Economic Development Annual Meeting, which will be held **Dec. 5-7 in Memphis**. The Site Consultant Program will be offered during this meeting for an additional fee.

Education & Talent Development Division: Upcoming programs will cover topics like the future of work and workplaces, middle school work-based learning programs and how to equip black, indigenous and people of color with credentials that lead to economic mobility. The Talent and Economic Development Annual Meeting will be held on **Dec. 5-7 in Memphis**. The event will feature talent pipeline and reskilling efforts happening in the region.

Events Division: Networking and informational calls are scheduled throughout the fall 2022, including several roundtables specifically for ACCE young professionals program organizers. We welcome Cally D'Angelo of the Gwinnett Chamber as the new chair of our division, and Paige Anderson of the Nashville Area Chamber as the new chair elect. Almost 90 events professionals are registered to participate in our Events & Communications Conference, presented by Meta, to be held in **Boulder on October 10-12**.

Finance & Operations Division: Coming off of a great in-person convention meeting, the division has welcomed 5 new advisory board members. They include Kristina Park with Amplify Clearwater, Tiffany Tauscheck with Greater Des Moines Partnership, Dean Blinkhorn with Ocala Metro Chamber, Simone Thornton with the Berkeley Chamber, and Michelle Epling with the Madison Chamber. We began the new program year with a September "Coffee and Connections" event featuring informal networking opportunities and idea sharing. Future learning opportunities will explore various software solutions, financial reporting requirements and employee engagement policies. The division's next call is scheduled for **October 25**.

Government Relations Division: The division continues to hold calls on the fourth Thursday of each month. Recent calls focused on workforce policy and programs, crime/public safety and legislative communications. The division's October call will focus on affordable housing, and its annual in-person meeting will take place **Nov. 13-15 in Houston, Texas**.

Partnerships & Membership Update

Beth Bronder, VP Development & Partnerships
October 2022

ACCE Membership Sales

Membership performance is very strong this year. Revenue is tracking ahead of goal through September for both new members and renewals. We are likely to exceed our stretch of \$1,465,000 for calendar year 2022 (Jan – Dec). Kate Teel has done a great job getting us on solid ground given that we were deep in database clean-up and past-due collections efforts at the start of this year. Associate membership – which are our business members who support chambers and communities – sales and renewals were strong on the heels of a successful convention experience for our industry partners. A newly launched [Business Directory](#) gives more tangible benefit to sell associate memberships throughout the year.

	YTD Actual	Annual Goal	
New member*	\$108,356	120,000	90%
Retention	\$1,204,894	1,120,000	108%
Total vs. goal	\$1,313,250	1,240,000	106%
vs. stretch goal	\$1,313,250	\$1,465,000	90%

*Includes associate membership revenue

Sales Report from Membership Director, Kate Teel:

In the past quarter we welcomed 39 new members and \$26,500 in new revenue. We welcomed 2 affinity chambers, 4 associate members and 7 category 3-12 members; our target category prospects for 2022. Renewals continue to trend positively at a strong pace. Year over year, overall membership revenue is up 49% vs 2021 collections YTD. Overall, membership is 107% to annual goal for total revenue and 91% to goal for new member revenue. October is our highest month for renewals both in number of accounts (222) and revenue dollars (\$351,500). We anticipate closing out the year in a good position. The membership team continues to follow newly implemented strategies for new member prospecting and retention and working with various departments to collaborate on messaging and unique touchpoints for prospects and new members. To date, the membership team has hosted 45 individual e-tours to onboard new members or highlight ACCE's member benefits and resources to chambers in their staff meetings.

ACCE Corporate, Division and Regional Sponsorship Sales

In corporate sponsorship we have gained ground and are now projected to be ahead of our fiscal year goal of \$425,000 (April 2022 – March 2023).

Post-convention sponsorship sales have been robust, and we have been busy pursuing opportunities to upsell convention sponsors to year-round commitments. We secured two new corporate sponsors this quarter with visit [ADP](#) (\$50K) and [Resource Development Group/RDG](#) (\$15K) and we have a half dozen pending agreements that we're hoping to close in October. Our associate, Ellie Colt, is managing sponsorship sales for our regional Event & Communications Conference and has secured \$8,000 to date. Regional conferences represent a small but growing revenue opportunity for ACCE both on registration and sponsorship.

ACCE Convention Sponsor/Exhibitor Sales (FINAL)

By all measures our reimagined trade show floor, The Circuit, was a success. The smaller venue combined with scheduled activities, ample seating, and Indy-themed attractions made the exhibit hall the community marketplace we hoped to create. Feedback was positive from all participants.

Post-event **sponsor** survey:

- 88% reported overall satisfaction with exhibit booth and The Circuit activities as good or excellent
- 90% rated their company's engagement with chamber attendees as good or excellent

Final sponsor/exhibitor sales figures for #ACCE22 put us 34% over goal and 49% over our sales results from Long Beach 2019. We have collected 100% of this revenue.

	Long Beach	Indy Goal	Indy Actual	
Exhibitor	151,000	126,000	127,135	100%
Sponsorship*	118,000	174,000	273,250	157%
Sub total	\$269,000	\$300,000	\$400,385	134%

*Includes host chamber sponsorship; does NOT include corporate sponsorship allocation.

Foundation Programming

2022 In-Person Meetings: In October, ACCEF will host a meeting for DEI practitioners in St. Louis, MO. The agenda is a mix of presentations, small group discussions and reflection exercises. Participants will discuss DEI metrics, inclusive economic growth, talent pipelines initiatives, best practices for engaging members among other topics.

The December Talent and Economic Development Annual Meeting in Memphis, TN will feature select economic and talent development work happening in the region, like the Blue Oval Project and UpSkill 901. Presentations and small group discussions will focus on how economic shifts impact site selection, educating the future workforce and other top-of-mind issues. This meeting includes ACCE's Site Consultant program. To ensure your talent or economic development staff professionals are on the list to receive an invitation to this meeting, please email Rumsha Ahmed (rahmed@acce.org).

Chamber Leadership Diversity Program: The second year of this program is underway. Participants met with board members, CCEs and each other in person at the ACCE Convention. They reflected on their leadership skills and shared program feedback. This year, participants will complete self-directed learning on finance, operations and governance, network with CCEs and work with ACCE staff on their CCE eligibility.

Special Programming Series: The ACCE Foundation is hosting two special series this fall. The first is a webinar on affordable housing policy efforts to educate chamber professionals on the variety of policy tools they can leverage. As a follow up to the webinar, two chambers will share their advocacy efforts and program initiatives on a roundtable call. The second series focuses on the work of the future and consists of three "bite-sized" sessions featuring experts on how workplace trends will impact economic development, emerging trends in employment practices and how chambers can help businesses develop the talent pipelines they'll need in the future.

Grant-Specific Programmatic Work

Rural Workforce Development: In August, Ascendium Education Philanthropies awarded the ACCE Foundation \$1.3M to support rural postsecondary education and rural workforce development. The work will focus on how chamber and business engagement in rural systems helps more workers gain access to well-paid, in-demand jobs in their communities. ACCEF will launch an RFP to identify interested communities and will provide subgrant funding to those selected.

Equitable Credential Attainment Cohort Program: Work continues for participants in our ECAC program, which is generously funded by the Lumina Foundation. Communities provided mid-program reports to highlight work to date and plans for the future. We featured work in Cleveland and Fargo during a session at the 2022 ACCE Convention. A few members of the cohort will be invited to speak at the American Association of Community Colleges' Workforce Development Institute in January 2023.

Urban Higher Education Ecosystems: ACCEF was awarded a \$700k grant from the Kresge Foundation on the role chambers of commerce can play in higher education ecosystem change. The team conducted several focus groups to understand the needs of chambers and what tools and resources will be most helpful in this work. This fall, we will draft and release our findings from those conversations which will inform the development of a workshop for chambers and higher education peers.

Smart Justice: We continue to develop programming in line with our grant from the Just Trust. We recently completed a comprehensive outline of smart justice programming for the coming year. Our most recent Smart Justice Peer Learning Community call was on September 27 and featured the work of the Toledo Chamber's REDI initiative.

Workforce and Skills Policy: ACCEF continues to support chambers in key states as they advocate for state-level policies to build a more skilled workforce. In November, chambers and workforce organizations will gather at the National Skills Coalition's Skills in the States Forum to discuss how to better collaborate on this work. While NSC will continue to work with chambers on state policy efforts, they have opted not to continue a partnership with ACCEF in 2023.

Skills-Based Hiring: ACCEF was awarded \$75K from the Markle Foundation to support chambers in skills-based hiring practices. The ACCEF team will deploy a "train the trainer" approach and support chambers in educating their members about skills-based hiring. The team expects to begin trainings in early 2023.

Development Pipeline and Partner Cultivation

Early Care and Education (ECE)

- Developing a relationship with Heising-Simons Foundation to discuss receiving support to strengthen the ECE workforce and provide more quality childcare options

Higher Education and Workforce Development

- Cultivating relationships with the Markle Foundation to ask for an introduction to Walmart.org to expand our skills-based hiring training opportunities for chambers
- Developing a proposal for a follow-on grant to Lumina Foundation to expand our work on equitable credential attainment to other communities
- Working with The Graduate! Network on a proposal to provide chambers tools and resources to work with employers who are interested in supporting education attainment to grow and retain in-house talent

Smart Justice

- Submitted a concept to Arnold Ventures, a key funder of the Clean Slate Initiative, to provide chambers with the education and tools to support more fair and equitable hiring practices
- Developing relationships with Schusterman Family Foundation, who are also encouraging the Blue Meridian Partners to support our work through their Justice and Mobility Fund

Career Readiness and Talent Pipelines

- Submitted a \$300K proposal to Truist to fund opportunities for career pathways and creating more diverse and inclusive talent pipelines

Small Business and Entrepreneurship

- Partnered with Fourth Economy to respond to an RFP from the Appalachian Regional Commission to study access to capital in Appalachia

Fringe Benefits, Inc.
Robert Heidt, Chairman
October 2022

The audit of FBI's processes, procedures, staffing and structure has been completed. We are still awaiting the consultants' final report. We will review the results with the FBI board and Trustees before end of the year to determine next steps.

While the team winds down 401k compliance and testing for the year, Stacey has engaged in strategic consultation meetings with several participating organizations to discuss the provisions of the SECURE ACT and SECURE 2.0 that may affect certain plans and budgets for the 2023 and 2024 calendar years.

On the insurance side, we are pleased to report that as of today there have been no notification of premium increases on any of the products. The renewed rollout of the long-term care program was short lived as it received little enthusiasm due to the complexity of the enrollment and underwriting process. UNUM will be providing FBI and the Benefits Trust information on a new whole life program with a long-term care rider that may be a suitable replacement. We will keep you apprised of any new product developments.

The benefits team will be meeting in November to document new internal procedures as well as develop additional year-end training content and plan administrator education for both 401k and insurance. We expect rollout of the plan administrator communications to begin in early December and continue through January 2023.

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	Feb. '22	Greater Rochester Chamber board of directors	Facilitator (virtual)	Part two of board and staff strategic planning retreats
Stacey Breslin & Kate Teel	Feb. '22	WACE annual conference	Glendale AZ	ACCE booth
Sheree Anne Kelly	Mar. '22	State Government Affairs Council annual conference	Panelist (virtual)	Convene Connect Collaborate: From Government Affairs to CEO
Sheree Anne Kelly	Mar. '22	Fox Cities Chamber board of directors	Appleton WI	Facilitated strategic planning retreat
Sheree Anne Kelly	Mar. '22	USCC Committee of 100	Austin TX	Spring meeting
Sheree Anne Kelly	Apr. '22	Oregon State Chamber annual conference	Hood River OR	Keynote speaker
Sheree Anne Kelly	Apr. '22	Maryland Assoc. of Chamber of Commerce Execs annual meeting	Hanover MD	Keynote speaker
Sheree Anne Kelly	Apr. '22	IEDC	Washington DC	Meeting with Nathan Ohle, new President & CEO, to discuss potential collaborations
Stacey Breslin & Beth Bronder	Apr. '22	MAKO annual conference	Branson MO	Sponsor and exhibitor
Sheree Anne Kelly	May '22	Comcast – Local Chambers of Commerce Education Program	Virtual	Speaker and facilitator for panel discussion on chamber government relations, economic development and talent and workforce initiatives
Sheree Anne Kelly	May '22	Greater Scranton Chamber board and staff retreats	Scranton PA	Facilitated 2-day strategic planning retreats
Sheree Anne Kelly	May '22	Greater Wyoming Valley Chamber board retreat	Wilkes-Barre PA	Facilitated strategic planning retreat
Sheree Anne Kelly	May '22	Reception hosted by New Orleans Chamber	New Orleans LA	Attended meet-and-greet with local chambers
Sheree Anne Kelly & Amy Shields	June '22	Greater Boston Chamber board	Boston MA	Presented on and facilitated a financial and foundation strategic planning discussion with board

Sheree Anne Kelly	June '22	TX Chamber of Commerce Execs annual conference	Rockwall TX	Keynote speaker
Amy Shields	June '22	Robert Wood Johnson Foundation	Virtual	Attended the first of two advisory council calls for the Anchor Business Convening
Stacey Breslin	June '22	Long Island chamber execs	Long Island NY	Attracting and retaining talent
Amy Shields	July '22	The Raleigh Chamber Foundation	Virtual	Presented on the state of chamber foundations
Amy Shields	Aug '22	Virginia Association of Chamber of Commerce Executives	Chesterfield VA	The future of chamber value and relevance
Beth Bronder & Amy Shields	Aug. '22	ASAE National Conference	Nashville TN	Attendees
Sheree Anne Kelly	Sept. '22	USCC Committee of 100	Washington DC	Fall meeting
Sheree Anne Kelly	Sept. '22	Vegas Chamber	Washington DC	Attended event for DC fly-in
Sheree Anne Kelly	Sept. '22	South Shore Chamber board meeting	Virtual	Presented on the future of chambers & South Shore Chamber's ACE Award
Sheree Anne Kelly	Sept. '22	Santa Monica Chamber board meeting	Virtual	Presentation about strategic planning services and the future of chambers
Sheree Anne Kelly	Sept. '22	Washington County Chamber	Virtual	Facilitated part one of strategic planning retreat
Sheree Anne Kelly	Sept. '22	DC Chamber	Virtual	Keynote speaker at the State of the District & Region Conference
Amy Shields	Sept '22	Bristol Chamber Board and Bristol Chamber Foundation Board	Virtual	Future of chambers and state of chamber foundations
Sheree Anne Kelly	Oct. '22	Chamber of Commerce Assoc. of Alabama	Virtual	Keynote speaker at annual meeting

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.