

# Board of Directors Meeting

April 29, 2021  
Via Zoom Meeting



ASSOCIATION OF  
CHAMBER OF COMMERCE  
EXECUTIVES

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# **Board of Directors Briefing Book**

## **April 29, 2021**

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## ACCE Board of Directors Meeting

April 29, 2021 | 2:00 p.m. EDT

Via Conference Call

### AGENDA

**2:00 pm**      **Welcome**

**Governance**

- Review and Approve Minutes – March 24, 2021 Meeting
- Consent Agenda – New Members for Approval
- Treasurer’s Report
  - Financial Report
- Nominations Update 2021-22
  - Officers slate
  - Board of directors

**2:15 pm**      **Rebecca Ryan, APF**

**NEXT Generation Consulting, Inc.**

How can you become comfortable with change and be willing to experiment (and fail), so that your strategic plan can be innovative and maybe break with tradition?

**4:00 pm**      **Adjourn**



ASSOCIATION OF  
CHAMBER OF COMMERCE  
EXECUTIVES

## Board of Directors 2021 Governance Meeting Calendar

### April

Virtual

Finance Committee	April 28	10:00 am EDT
Executive Committee	April 28	3:00 pm EDT
Board of Directors	April 29	2:00 pm EDT

### July

Virtual

Finance Committee	July 12	1:00 pm EDT
Executive Committee	July 12	3:00 pm EDT
Board of Directors	July 14	3:00 pm EDT

### \*October – TBD

Finance Committee	TBD
Executive Committee	TBD
Board of Directors	TBD

\*TBD whether virtual or in-person.

**Additional committee meetings via conference call announced as needed.**

# ACCE Board of Directors Meeting

March 24, 2021 | 3:00 p.m. EDT

Via Conference Call

## MINUTES

Present: Juliet Abdel, Robin Anderson, Sara Armstrong, Alisha Benson, Carl Blackstone, Kathy Blank, Beth Bowman, David Brown, Jay Byers, Adrian Cain, Kati Capozzi, Terra Carroll, Chip Cherry, Graham Cobb, Adrienne Cole, Greg Durocher, Natalie English, Tiffany Esposito, Mark Fisher, Christy Gillenwater, Eric Godet, David Griggs, Brian Hall, RaDonna Hessel, Michael Huber, Ken James, Adam Knapp, Brad Lacy, Megan Lucas, Kelle Marsalis, Matt McCormick, Sherry Menor-McNamara, Rachel Morris, Matt Morrow, Carlos Phillips, Matt Pivarnik, David Prunte, Brittany Quick-Warner, Jeff Rea, Joe Reardon, James Reddish, Janet Riopel, Beverly Robertson, Bob Rohrlack, Jim Rooney, David Rumbarger, Maria Salinas, Kevin Sheilley, Bill Sisson, Vern Squier, Sherry Taylor, Tony Vedda, Ashli Watts, Roy Williams, Sandra Wilson and Gilbert Zavala

Excused for CCE Interviews: Doris Carson Williams and Jim Page

Excused: Michel Leblanc, Adam Marshall, Todd Sanders and Bryan Starr

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

Chair Jay Byers called the meeting to order and welcomed all.

Byers reviewed the minutes from the January 28, 2021 meeting. There were no changes and a motion to accept the minutes was made by Kati Capozzi; approved by all directors via electronic voting. *Motion carried.*

Treasurer Bill Sisson presented the 2021-22 proposed budget for consideration. This budget reflects a negative bottom line for the 2021-22 fiscal year in order to meet the future needs of ACCE and its related entities. Of note is that ACCE will end its 2020-21 fiscal year with a significant surplus due to full insurance reimbursement for its cancelled 2020 convention, better-than-budgeted virtual summit performance and a freeze on all non-essential spending. Critical infrastructural investments that were paused will be implemented in 2021-22 to ensure the organization is positioned to successfully meet the needs of its members and the industry. Sisson noted that the PPP loan secured in February for \$300,000 will offset the deficit, ultimately resulting in a very modest shortfall of less than 1% of total organization-wide revenue.

CEO Sheree Anne Kelly reviewed specific budget items and answered questions.

A motion to adopt the proposed budget for 2021-22 was made by Eric Godet and approved by all directors via electronic voting. *Passed.*

Sisson shared that ACCE has increased its reserve funding significantly – to more than six months of working capital – in the past three and a half years. Overall, the organization is poised to produce a net neutral budget in the 2022-23 fiscal year.

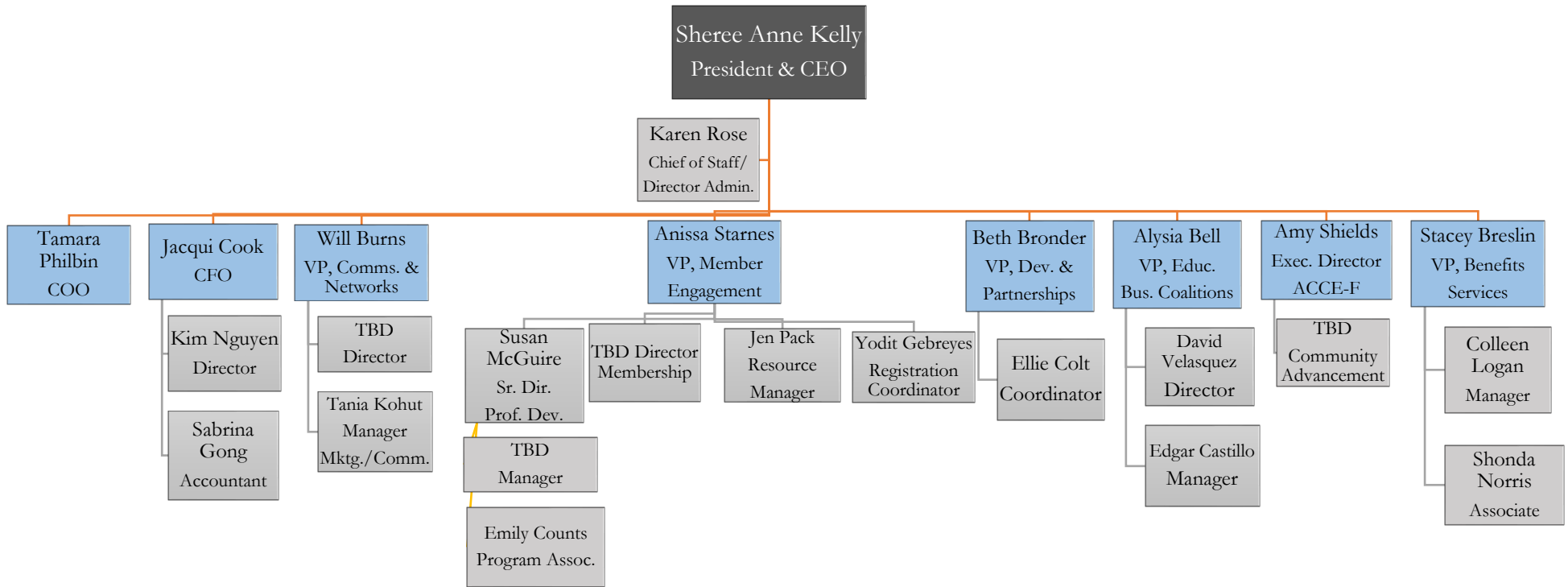
Kelly facilitated an interactive discussion about the current state of the chamber industry, which included a survey about resuming in-person events, returning to the workplace and other concerns due to the ongoing pandemic. The survey was conducted electronically, and results were shared in real time.

*Meeting adjourned.*

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

### **Organization**

Hispanic Chamber of Commerce of Metro Orlando  
Waconia Chamber of Commerce  
DigiCal Web Designs  
Compton Chamber of Commerce  
Southwest JOCO EDC  
Greater Vernon Chamber of Commerce  
Perkiomen Valley Chamber of Commerce  
Silverdale Chamber of Commerce  
Greenwich Village Chelsea Chamber of Commerce  
Farmington Regional Chamber  
Pickerington Area Chamber  
Northfield Area Chamber of Commerce & Tourism  
Jerome Chamber of Commerce  
Montgomery County Convention Facilities Authority  
New Memphis Institute  
Choctaw Chamber of Commerce  
Fort Bend Chamber of Commerce  
Coalition of Filipino American Chambers of Commerce  
Sturgis Area Chamber of Commerce  
Iowa Association of Chambers of Commerce  
Nampa Chamber of Commerce  
Tarboro Edgecombe Chamber of Commerce  
Mint Hill Chamber of Commerce  
Colby/Thomas County Chamber of Commerce  
Syracuse-Wawasee Chamber of Commerce



\*Contractors who conduct work on behalf of various departments and have interaction with members:

Jamie  
Barbaccia-  
Holmes

Carol Carlton

Association of Chamber of Commerce Executives  
Consolidated Projects  
For the Eleven Months Ending February 28, 2021

JC-09CONSBS  
Page 1

	ACCE	FBI	Foundation	Eliminations	CONS
Consolidated Balance Sheet					
<b>ASSETS</b>					
Cash	2,517,914.02	\$573,064.31	\$572,628.78		\$3,663,607.11
Investments	489,609.92	\$0.00	\$0.00		\$489,609.92
Investments - 457B	113,418.82	\$0.00	\$0.00		\$113,418.82
Investment in Subsidiary	506,962.40	\$0.00	\$0.00		\$506,962.40
Accounts Receivable - General (net)	39,074.64	\$113,901.38	\$0.00		\$152,976.02
Accounts Receivable - Trust	0.00	\$157,894.41	\$0.00		\$157,894.41
Grant Receivable	0.00	\$0.00	\$0.00		\$0.00
Due from Related Entities	255,394.50	\$0.00	\$0.00	(255,394.50)	\$0.00
Prepaid Expenses	38,672.74	\$7,019.92	\$17,248.40		\$62,941.06
Prepaid Expenses - Convention	0.00	\$0.00	\$0.00		\$0.00
Prepaid Expenses - Virtual Summit	9,282.51	\$0.00	\$0.00		\$9,282.51
Deposits	11,312.12	\$975.00	\$0.00		\$12,287.12
Fixed Assets, Net	203,991.05	\$70,822.73	\$0.00		\$274,813.78
<b>TOTAL ASSETS</b>	<b>\$4,185,632.72</b>	<b>\$923,677.75</b>	<b>\$589,877.18</b>	<b>(\$255,394.50)</b>	<b>\$5,443,793.15</b>
<b>LIABILITIES</b>					
Accounts Payable & Accrued Expenses	140,770.17	\$17,041.18	\$19,500.00		\$177,311.35
Accounts Payable - Trust	(11,616.82)	(\$2,342.00)	\$0.00		(\$13,958.82)
457B Liability	113,418.82	\$0.00	\$0.00		\$113,418.82
Due to Related Entities	0.00	\$221,987.52	\$33,406.98	(255,394.50)	\$0.00
Deferred Dues	651,445.62	\$0.00	\$0.00		\$651,445.62
Deferred Other	47,331.00	\$3,396.55	\$423,380.98		\$474,108.53
Deferred Rent	118,315.00	\$0.00	\$0.00		\$118,315.00
Deferred Convention	18,669.00	\$0.00	\$0.00		\$18,669.00
Deferred Revenue National Sponsors	63,186.67				\$63,186.67
Deferred Revenue - Virtual Summit	0.00	\$0.00	\$0.00		\$0.00
Note Payable	300,022.00				\$300,022.00
Capital Lease Obligations	28,227.00	\$0.00	\$0.00		\$28,227.00
<b>TOTAL LIABILITIES</b>	<b>\$1,469,768.46</b>	<b>\$240,083.25</b>	<b>\$476,287.96</b>	<b>(\$255,394.50)</b>	<b>\$1,930,745.17</b>
<b>NET ASSETS</b>					
Net Assets - Unrestricted	2,105,211.59	\$506,962.40	\$44,820.28		\$2,656,994.27
Net Assets - Temporarily Restricted	0.00	\$0.00	\$0.00		\$0.00
YTD Change in Net Assets	610,652.67	\$176,632.10	\$68,768.94		\$856,053.71
<b>TOTAL NET ASSETS</b>	<b>\$2,715,864.26</b>	<b>\$683,594.50</b>	<b>\$113,589.22</b>	<b>\$0.00</b>	<b>\$3,513,047.98</b>
<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<b>\$4,185,632.72</b>	<b>\$923,677.75</b>	<b>\$589,877.18</b>	<b>(\$255,394.50)</b>	<b>\$5,443,793.15</b>

Association of Chamber of Commerce Executives  
Consolidated Statement of Activity  
For the Year to Date Period Ending February 28, 2021

	February 21 YTD ACTUAL	February 21 YTD Budget	2020-21 Annual Budget	February 21 Actual vs. Budget YTD \$\$ Variance	February 21 Actual vs. Budget YTD % Variance	Feb 20 YTD ACTUAL	February 21 Actual vs. Feb. 20 Actual % Variance
<b>FBI</b>							
Total FBI Revenue	992,910.56	990,916.67	1,081,000.00	1,993.89	0%	999,945.68	(1%)
Total FBI Expense	816,278.46	917,488.92	1,000,897.00	(101,210.46)	(12%)	945,086.02	(16%)
<b>FBI Net Income</b>	<b>176,632.10</b>	<b>73,427.75</b>	<b>80,103.00</b>	<b>103,204.35</b>	<b>58%</b>	<b>54,859.66</b>	<b>69%</b>
<b>Foundation</b>							
Total Revenue	1,076,367.15	1,181,183.00	1,231,931.00	(104,815.85)	(10%)	1,069,777.31	1%
Total Expense	1,007,598.21	1,169,299.58	1,188,096.00	(161,701.37)	(16%)	1,054,435.05	(5%)
<b>Foundation Net Income</b>	<b>68,768.94</b>	<b>11,883.42</b>	<b>43,835.00</b>	<b>56,885.52</b>	<b>83%</b>	<b>15,342.26</b>	<b>78%</b>
<b>ACCE</b>							
<b>Revenue</b>							
Annual Convention	305,574.00	0.00	85,638.07	305,574.00	100%	893,346.95	(192%)
Virtual Convention ~ Summit	288,206.00	205,000.00	205,000.00	83,206.00	29%	0.00	100%
Awards/COY Revenue	39,049.00	36,250.00	36,250.00	2,799.00	7%	20,700.00	47%
Certification	8,250.00	10,600.00	10,600.00	(2,350.00)	(28%)	11,050.00	(34%)
Chamber Education	11,046.00	11,020.00	11,020.00	26.00	0%	18,961.00	(72%)
Chamber Executive Magazine Rev	65,365.01	76,980.00	76,980.00	(11,614.99)	(18%)	95,145.00	(46%)
Economic Development	4,500.00	0.00	0.00	4,500.00	100%	3,250.00	28%
Executive Search	6,088.87	5,958.33	6,500.00	130.54	2%	10,011.89	(64%)
Membership Revenue	1,375,872.88	1,231,083.33	1,343,000.00	144,789.55	11%	1,572,744.07	(14%)
Metro Cities Revenue	23,862.00	26,200.00	26,200.00	(2,338.00)	(10%)	52,015.20	(118%)
Misc Income	8,718.23	18,333.33	20,000.00	(9,615.10)	(110%)	20,868.72	(139%)
National Corporate Sponsors Revenue	282,389.57	287,563.33	287,563.33	(5,173.76)	(2%)	267,995.00	5%
Publications & Research Revenue	1,508.00	1,382.33	20,000.00	125.67	8%	4,983.00	(230%)
<b>Total ACCE Revenue from Operations</b>	<b>2,420,429.56</b>	<b>1,910,370.66</b>	<b>2,128,751.40</b>	<b>510,058.90</b>	<b>21%</b>	<b>2,971,070.83</b>	<b>(23%)</b>
<b>Expense</b>							
Admin (Operations, Occupancy, Governance)	368,559.89	410,267.24	447,564.26	(41,707.35)	(11%)	448,977.79	(22%)
Admin Personnel Costs	345,990.48	440,502.61	480,548.30	(94,512.13)	(27%)	459,749.79	(33%)
Annual Convention	158,652.76	161,913.22	161,913.22	(3,260.46)	(2%)	934,597.71	(489%)
Virtual Convention ~ Summit	155,861.46	171,522.30	171,522.30	(15,660.84)	(10%)	0.00	100%
Awards/COY Expense	21,409.79	28,963.11	28,963.11	(7,553.32)	(35%)	40,576.05	(90%)
Certifications Expense	18,656.29	13,807.14	13,807.14	4,849.15	26%	27,630.64	(48%)
Chamber Education Expense	49,649.27	60,992.36	66,537.12	(11,343.09)	(23%)	68,911.08	(39%)
Chamber Executive Magazine Expense	42,349.99	40,691.01	40,691.01	1,658.98	4%	81,270.52	(92%)
Divisions Expense	15,308.48	19,804.03	21,604.40	(4,495.55)	(29%)	8,676.34	43%
Economic Development	0.00	0.00	0.00	0.00	0%	17,951.63	0%
AskACCE	85,783.53	89,360.51	97,484.19	(3,576.98)	(4%)	91,196.08	(6%)
Membership Expense	347,346.32	324,950.67	354,491.64	22,395.65	6%	402,152.10	(16%)
Metro Cities Expense	11,600.14	14,445.63	14,445.63	(2,845.49)	(25%)	29,697.46	(156%)
National Corporate Sponsors Expense	136,226.62	159,882.08	174,416.81	(23,655.46)	(17%)	158,714.61	(17%)
Publications & Research Expense	13,070.26	15,583.33	37,000.00	(2,513.07)	(19%)	14,849.64	(14%)
Web Expense	39,311.61	37,707.99	41,135.99	1,603.62	4%	41,996.10	(7%)
<b>Total ACCE Expense from Operations</b>	<b>1,809,776.89</b>	<b>1,990,393.23</b>	<b>2,152,125.12</b>	<b>(180,616.34)</b>	<b>(10%)</b>	<b>2,826,947.54</b>	<b>(56%)</b>
<b>ACCE Net Income</b>	<b>610,652.67</b>	<b>(80,022.56)</b>	<b>(23,373.72)</b>	<b>690,675.23</b>	<b>113%</b>	<b>144,123.29</b>	<b>76%</b>
<b>Total ACCE &amp; Affiliates Revenue</b>	<b>4,489,707.27</b>	<b>4,082,470.33</b>	<b>4,441,682.40</b>	<b>407,236.94</b>	<b>9%</b>	<b>5,040,793.82</b>	<b>(12%)</b>
<b>Total ACCE &amp; Affiliates Expenses</b>	<b>3,633,653.56</b>	<b>4,077,181.72</b>	<b>4,341,118.12</b>	<b>(443,528.16)</b>	<b>(12%)</b>	<b>4,826,468.61</b>	<b>(33%)</b>
<b>Total ACCE &amp; Affiliates Net Income</b>	<b>856,053.71</b>	<b>5,288.61</b>	<b>100,564.28</b>	<b>850,765.10</b>	<b>99%</b>	<b>214,325.21</b>	<b>75%</b>

# ACCE Finance Report

## February 28, 2021 Financial Statements (11 months into the FY)

### Balance Sheet

Our cash position is strong with over \$3.6 million. “Due from related entities” is the amount owed to ACCE by FBI and the ACCE Foundation for ordinary operational expenses and consulting. Please note that these amounts will be reduced in March due to quarterly payments between entities. ACCE consolidated net assets are standing at \$5 million.

### Consolidated Statement of Activity

With one month remaining in the 2020-21 fiscal year, we anticipate ending the year with a significant surplus across all three entities.

Convention – the 2020 Annual Convention was canceled publicly as of May 2020. All listed expenses are sunken costs, including site visits and staff time. The revenue listed is the full insurance payment thanks to our pandemic insurance coverage.

Virtual Summit – the Future of Chambers Summit was a successful event for ACCE and had the highest participation rate of any event in the organization’s history. The revenue for this event exceeded budget expectations and the expenses were lower than projected. Due to our members’ and partners’ steadfast support, ACCE’s first Virtual Summit yielded a net surplus of \$132k.

Membership Revenue – ACCE membership dues revenue is above the projected YTD budget, which was adjusted downward in the COVID-19 budget. Deferrals from last year have contributed to our YTD figures being above budget. We anticipate that this line item will trend downward in the next fiscal year due to the continued financial challenges of many of our members. We have allowed for slower collections which has helped to retain members.

Admin Personnel Costs – included in this line item are expenses related to employees’ PTO. The variance in this line item is attributed to staff vacancies and current staff taking less than budgeted PTO hours due to working from home during COVID-19.

ACCE Expenses from Operations – most expenses for the 11 months of the fiscal year are lower than budget. This is primarily due to an across-the-board moratorium on spending due to COVID-19 that was implemented at the beginning of the fiscal year. This trend will continue thru year end as staff works from home and conducts all activities virtually.

Net Income – eleven months into the year the ACCE net is better than budget. FBI is running ahead of budget and the foundation currently has a positive net income, which is better than budget. The foundation’s budget, which is dependent on foundation grants, can vary significantly in its short-term revenues due to grant delivery even though the long-term trend has been steady.

# **Membership & Professional Development Report**

**Anissa Starnes, IOM / Vice President, Member Engagement**  
**Susan O'Sullivan McGuire / Senior Director, Professional Development**

## **Membership Recruitment and Retention**

- Anissa Starnes has been hired full-time as vice president, member engagement and will oversee the member knowledge center, professional development programming and membership recruitment and retention. Her first official day with ACCE was April 1.
- ACCE will be hiring a new Director of Membership that will lead overall recruitment and retention efforts. The position was posted on April 15. Closing date to apply is May 5.
- We continue to focus on the A/R list for all past due members from 2020. Special thank you to the board members who have assisted us in this effort.
- In Q1 we saw an increase in interest from prospective members compared to the last 12 months.
- We have also seen an increase in chambers reaching out to increase their engagement with ACCE and we have been fielding calls to facilitate that work.
- Members continue to be appreciative of the flexibility and consideration being offered to them to make payment arrangements allowing for additional time to pay their dues.
- Twenty-three (23) new members have joined ACCE since the last board report.

## **CCE program**

The 2021 program year continues with a class of 16 CCE candidates having completed the essay, interview, and presentation requirements. Interviews and presentations were conducted by commissioner panels virtually in March, and the CCE examination period begins on May 10. The 2021 class will be presented at our July 2021 virtual summit.

## **E-learning**

Our winter 2021 professional development schedule included our annual *From the Winner's Circle* series along with additional webinars on CEO careers in the chamber industry, creating effective foundation strategic plans, funding community impact through chamber foundations, and managing and motivating work-at-home staff. Our spring webinars will continue the learning with sessions on hybrid events, leveraging diverse partnerships in economic development, and event professional certifications.

Our new online learning portal will provide streamlined access to live online events, recorded content, toolkits, multipart e-courses, a CCE portal, and other resources. All division roundtable recordings and other resources will be accessed through the new catalog, which will be linked to our new website and information library. The system will make it easier for members to track participation in learning opportunities and for staff to build and provide access to quality educational opportunities for all members. Here is a visual of the new LMS.

Welcome to ACCE's online learning platform, which provides access to live online events as well as a curated catalog of on-demand resources. To explore our offerings, please select one of the sections below. You can also browse on-demand resources by topic:

Membership  
Development

Programs &  
Events

Marketing &  
Communications

Governance &  
Leadership

Human Resources

Operations &  
Finance

Non-Dues  
Revenue

Government  
Relations

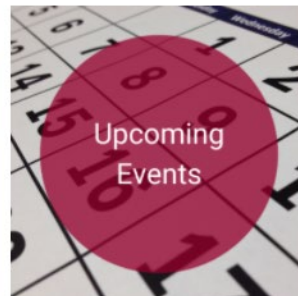
Education & Talent

Diversity, Equity &  
Inclusion

Economic & Community  
Development

**Pandemic and Recovery  
Resources**

**Partner Solutions**



We have begun additional investments in our professional development team this quarter. Emily Counts has been promoted to Program Associate and will expand her work in the professional development area. We have begun a search for a Professional Development Manager who will focus particularly on expanding our e-courses and other online and hybrid professional development products along with managing our growing library of learning resources. Susan McGuire has been promoted to Senior Director, Professional Development, and will lead these efforts.

## Summit 2021

Our summer summit will take place virtually July 19-21. Our program will focus on the transformational leadership required to help our communities bounce back stronger than ever, as we explore major trends driving the future of our industry. Programming features innovative ideas and best practices in all areas of chamber work through keynotes by Chip Heath and Erica Dhawan, live breakout sessions, peer-led roundtables, and on-demand workshops. Registration is targeted to open in early May and will feature early-bird pricing and discounts on group registrations from the same chamber.

## Information Office

The [AskACCE Team](#) continues to provide Q&A and in-depth research services to ACCE members and experienced a drastic increase in requests since the beginning of the year, largely related to Dynamic Chamber Benchmarking and Chamber of the Year, as well as an increase in research.

Members have participated in the 2020 Operations Survey in [Dynamic Chamber Benchmarking](#). Data clean-up is in process and the 2020 Economic Recovery Report goal release date is early May. An overall re-evaluation of ACCE's benchmarking and metrics program has prompted RFPs from various benchmarking and data visualization companies.

Info Office staff are uploading samples to the new Member Knowledge Exchange, formerly the Samples Library. Preparations are being made to migrate Resource Guides to the new website in phase 2 of the migration.

The screenshot shows the ACCE Association of Chamber of Commerce Executives website. The navigation menu includes ABOUT, PROGRAMS, TOPICS, RESOURCES, and FRINGE BENEFITS. The main heading is "Member Knowledge Exchange" with a search bar below it. A filter panel is open, showing options for CONTENT TYPE (Communications, Governance and Policy Documents, Marketing Publications, Operations and HR), TOPICS (Diversity Equity and Inclusion, Economic Development, Education and Talent, Governance and), REVENUE CATEGORY (A. \$300k or less, B. \$300k to \$500k, C. \$500k to \$1M, D. \$1M to \$3M, E. \$3M to \$5M), and POSTED DATE (From, To). An "Apply Filters" button is visible below the filter panel. Two resource cards are shown below the filter panel:

- Merger Presentation Slides**  
PUBLISHED: JANUARY 2020  
Indy Chamber  
Slides from a presentation outlining the opportunities and challenges of the Indy Chamber's merger with local economic development organizations Indy Partnership, Develop Indy, and Business Ownership.  
Buttons: Details, View
- Partnership Roadmap Committee**  
PUBLISHED: JANUARY 2020  
Greater Coachella Valley Chamber of Commerce  
A document providing an overview of the Partnership Roadmap Committee, which is tasked with finding the most viable path forward for a partnership and/or merger among interested and participating chambers.  
Buttons: Details, View

# Communications & Networks Report

## Will Burns, Vice President – Communications & Networks

### ACCE Communications

**Chamber Executive:** The Winter 2021 edition of *Chamber Executive* is online. The issue highlights emerging membership trends along with features on transformational leadership skills; how event professionals adapted to COVID, thought leadership, our first Grow with Google Partnership Award winner and more.



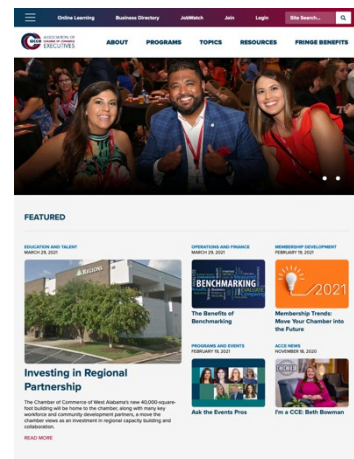
- Spring 2021 issue will launch in May. The cover story will focus on how chambers can create a data-drive culture to improve operations, make better decisions and showcase the value of their community impact work. The issue will also celebrate our Awards for Communications Excellence winners and explore chamber communications trends.



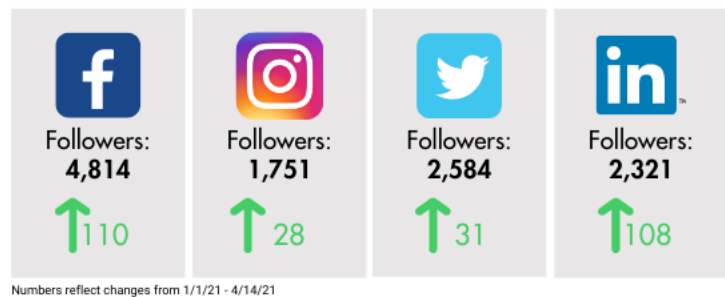
**Awards for Communications Excellence (ACE):** The 2020 competition, sponsored by Facebook, attracted 173 entries, nine more than 2019. Judging is now underway, with 16 chamber communications professionals reviewing the entries and selecting the winners. Up to 12 Awards for Communications Excellence winners will be announced and considered finalists for the Best in Show title within their respective entry category (based on their chambers' total revenue). Winners will be announced in April and recognized in the Spring issue of the virtual *Chamber Executive* magazine.

**Website Redesign:** ACCE will launch a redesigned website this summer that will enhance the association's ability to tell chamber stories and provide improved virtual peer connections. Key features will include:

- A robust learning management system to house all of the association's online learning and showcase our professional development programming in a streamlined, user-friendly way.
- An enhanced digital storytelling platform to share chamber stories and best practices.
- An online community platform to drive deeper member engagement and peer learning opportunities.
- An all-new Member Knowledge Exchange to find sample documents, policies, job descriptions and more.



**Web & Social Traffic:** ACCE's average monthly website traffic in the first 3 months of 2021 is up 9 percent over the average monthly traffic in 2020, driven by the weekly email by the CEO, interest in ACCE's March Sales Training Conference, the annual summit speaker RFP and interest in online resources. The association also continues to grow its reach on social media platforms.



## Community Peer Groups

**Metro Cities Council & Major Cities Council:** The Metro Cities Council and Major Cities Council held a joint virtual meeting to take the place of the in-person meetings typically held in a peer city. The program focused on inclusive economic recovery and featured speakers from Brookings, Fourth Economy, National Retail Federation and more. We are planning to relaunch in-person meetings for peer groups in the fall 2021.

**Emerging Cities Council:** Emerging Cities Council roundtables continued in February with a call focused on best practices for virtual events and transitioning to in-person programs. Our April call will feature special guest Bob Harris, CAE, who will present and lead a discussion on post-COVID strategic planning. The council's Google Group remains active.

**Hometown Chamber Council:** The Hometown Chamber Council continues to hold regular calls and share initiatives and ask questions in its active Google Group. The February call focused on remote and flexible work and featured Chris Romer of the Vail Valley Partnership discussing his organization's [Results Oriented Work Environment](#) and Kim Schlaepfer, project manager at the Climate Action Collaborative sharing her organization's "[Trends with Benefits](#)" remote work policy resources. The April call will feature a discussion on the return to live events and membership trends.

## Divisions

**Membership Development Division (MDD).** Our virtual sales conference held on March 11 – 12, was our largest regional conference to date, with over 200 registrants participating in three general sessions and 12 workshops. We kicked off the conference with a presentation on storytelling by Libby Spears, one of our most popular conference speakers. On our second day, we focused on strategies to promote deeper involvement by business owners and leaders of diverse backgrounds as investors and partners in the work of our organizations. We began with a keynote by leadership author and trainer Anton Gunn, followed by discussion groups facilitated by chamber professionals active in our Diversity, Equity, and Inclusion division.

In other conference workshops and roundtables, we covered techniques for mission-driven sales, innovative revenue models, smart use of data, selling over Zoom, use of LinkedIn for recruitment and engagement, developing sales playbooks, recruiting great membership teams and much more. Opportunities for informal peer support and networking were provided through our engagement lounge and a special edition of our Coffee and Connections networking series.

Division roundtables continue in April, May, and June. Our 2020-2021 sales contest concludes in early June, and a virtual sales awards show is planned for later in the month, along with an encore edition of our virtual "60 Sponsorship Ideas" event. A robust set of virtual workshops and roundtables on membership and revenue topics are planned for our July summit.

**Communications Division:** The division continued its roundtable calls focused on chamber communications strategies and tactics. The March call focused on email marketing and featured guest speaker Thomas Nettesheim from Constant Contact who presented benchmarks from chambers of commerce using the platform and shared six email marketing lessons from a challenging 2020.

**Diversity, Equity & Inclusion Division:** The division continues to hold monthly roundtable calls about the equity impacts of COVID-19 and the work chambers are doing in this area. Recent calls focused on the Metro Milwaukee Association of Commerce's [Region of Choice program](#), partnering with others on DEI work and internal DEI efforts. Please see the Foundation Report for more information about broader DEI programs.

**Economic & Community Development Division:** The division continues to hold calls every other month to discuss how COVID-19 and economic recovery efforts intersect with economic and community development. Recent calls focused on virtual engagement and chamber/EDO mergers. The division advisory council is also working with the Education and Talent Development Division leadership to plan a joint convening in November 2021.

**Education & Talent Development Division:** The division continues to hold monthly roundtable calls or webinars. Recent topics included internship programs, using chamber foundations to fund community impact and talent attraction. There was also a special call for education and talent staff on how chambers are engaging with community colleges to address workforce development and reskilling.

**Events Division.** The division's roundtables highlighted innovative solutions for community events and sponsorship packages and how they have been revised for 2021. We also held separate best practices calls for young professionals and intercity visit organizers.

We have a full spring professional development schedule. During April, we begin an arc focused on hybrid events, including a roundtable led by division chair-elect Sydney Doctor and a webinar presented by the Gwinnett Chamber of Commerce team. In May, we turn our attention to professional development for chamber events professionals. We plan a division roundtable on certification and personal branding, followed by a webinar co-presented by the Events Industry Council on the Certified Meeting Planner (CMP) designation. Our June roundtable will highlight the evolving legal requirements around returning to in-person events featuring attorney Jeff Tenenbaum. Our July 2021 summit will include programming on additional events topics.

**Finance & Operations Division.** As we continue to grow this new division, we are grateful for the following finance and operations professionals who have stepped up to comprise our first division advisory council:

- Jodi Owczarski, Vice President, Michigan West Coast Chamber of Commerce (chair)
- Neil Christopher, Vice President, Mobile Area Chamber of Commerce
- Mary McNairy, Vice President, Finance & Administration, Huntsville Madison County Chamber
- Jennifer Reiser, CCE, IOM, Chief Operating Officer, Billings Chamber of Commerce
- Carla Wright, Chief Financial Officer, Greater Louisville Inc

Our April roundtable call featured a presentation and discussion on the federal Employee Retention Tax Credit and Paycheck Protection Program. On our June call, we will discuss and share best practices for employee evaluation processes and compensation. We are planning further learning and peer sharing opportunities at our July summit.

**Government Relations Division:** The division continues monthly calls to share insights and help government relations professionals navigate challenging times. The March call focused on advocacy events, including legislative briefings, DC fly-ins and state capitol visits. The April call focused on how chambers are engaging on social issues and managing corporate engagement and response to issues like voting reform, police reform, transgender sports participation and more. We also covered the national trend of state governments seeking to override local control in a wide variety of issues. The division is also planning its annual in-person meeting in the fall.

## **Partnerships & Sponsorships**

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

#### **Corporate Sponsorship**

We have had positive responses on first quarter corporate sponsor renewals. Two of our three travel sponsors are seeing solid interest in chambers wanting to get back to travel starting later this year. Both Aventura and Collette have renewed their corporate sponsorships, along with Facebook, Insperity, U.S. Chamber and MemberClicks. Comcast has gone through some changes on their government relations/community engagement team and has not yet renewed. Spring renewals that we are working on are Google and Cognizant.

#### **Prospecting/New Investors**

Our list of existing prospects remains the same and with the annual meeting approaching we are working on how to engage partners in our virtual program. One of those prospects, an NIH-funded, non-profit group launching a PPE/Covid online marketplace, is considering a Strategic Partnership and significant investment (\$50K). The group wants to leverage chambers to reach frontline businesses, public sector agencies and community events with reputable PPE supplies and rapid testing for workers and the public at large.

#### **What's Ahead**

We are finalizing marketing materials for the July Summit to pursue sponsorships and exhibitors. We have received some feedback about virtual/zoom fatigue, as well as a handful of our exhibitors finding the engagement experience from last year to have been less robust than anticipated. We're making enhancements to engagement opportunities, integrating sponsors into the program when possible, and exploring ways to get attendees to interact more with the vendors. These adjustments should hopefully help to secure sponsor and vendor participation.

# ACCE Foundation Report

Amy Shields, Executive Director – ACCE Foundation  
Alysia Bell, Vice President – Education Business Coalitions

## Foundation Programming

**Chamber Leadership Diversity Program:** This three-year program is designed to enhance the leadership capacity of chamber professionals from diverse backgrounds, including racial/ethnic minorities, women, those who identify as LGBTQ+, or those with a disability. Ten chamber professionals will be selected to engage in a range of professional development opportunities over the course of the program, including a scholarship to attend two ACCE annual conventions. The cohort will be announced in May.

**Fellowship for Economic Recovery:** The cohort continues to explore topics related to economic recovery. Recent sessions have covered equitable economic development, supporting small businesses, and education and talent development for tomorrow's economy. The final full-day virtual convening will be held in early May, and participants will each produce a five-minute video on their plans to implement what they have learned in their own communities. Planning for the next Fellowship cohort is currently underway, and applications will launch in April 2021.

**Diversity, Equity and Inclusion Programs:** This year's Sales Training Conference featured keynote speaker Anton Gunn who talked about intentional leadership around DEI. The session was followed by small group roundtables that were facilitated by chamber DEI practitioners from across the country. ACCE continues to find ways to incorporate DEI across all areas of chamber work. In March, there was a two-part workshop on strategic planning with a DEI focus. More than 160 people registered for these sessions, which were delivered by Kuma Roberts of Arrowhead Consulting. The sessions included several models for understanding diversity, equity and inclusion, evaluating where an organization is along the continuum, and levers for change to become a more equitable organization.

## Grant-Specific Programmatic Work

**Workforce and Skills Policy:** In partnership with the National Skills Coalition's Business Leaders United, the ACCE Foundation continues to support chambers in key states as they advocate for state-level policies to build a more skilled workforce. State network leads meet regularly with each other and with national supporters. This year's partnership also provides opportunities for chambers to engage in WIOA reauthorization and reform and to consider the intersection of racial equity and workforce development policies.

**Smart Justice:** ACCE continues to engage the smart justice peer learning community through the [quarterly newsletter](#) and peer-to-peer calls. A new grant with the Annie E. Casey Foundation will focus on how chambers can engage in juvenile justice reforms as a key strategy to break the "school-to-prison pipeline." New work with the Clean Slate Initiative will focus on the role of chambers in including formerly incarcerated populations as a key workforce development strategy to meet regional workforce needs.

**Early Childhood Engagement:** Through a grant from the Pritzker Children's Initiative, the ACCE Foundation is working with nonprofit networks in several states to increase the engagement of the business community in programs and policies that impact children ages three and younger. ACCE will work with chambers in each state to build relationships and inform the work of state networks. Target states will be finalized in April, and work will begin in May.

**Afterschool/STEM:** ACCE's grant with the Mott Foundation via the STEM Next Opportunity Fund wrapped up in March. This grant focused on raising awareness of how afterschool programs can offer opportunities to explore career pathways while developing the soft/technical skills needed in the workforce. Activities for this grant included connecting chambers with their state afterschool networks, hosting a

[webinar](#) on career pathways, and creating a [value proposition](#) on how chambers can leverage afterschool programs to amplify talent development.

## **Development Pipeline and Partner Cultivation**

### **Community College and Workforce Development**

- Submitted a proposal to the Lumina Foundation to build partnerships between a set of chambers, community colleges and partners to increase credential attainment.
- Submitted a concept to Strada Education Network to support partnerships between community colleges and chambers.
- Submitting a proposal for a Department of Labor grant in partnership with the American Association of Community Colleges and National Association of Workforce boards. The grant focuses on technical assistance to expand and modernize registered apprenticeships.

### **Small Business and Entrepreneurship Support**

- Developing relationships with the Kellogg Foundation related to supporting business owners of color and access to capital.
- Developing relationships with J.P. Morgan Chase & Co. Areas of intersection include supporting business owners of color to help them gain access to capital, building a more equitable and representative workforce, and supporting solutions and job training to advance racial equity in the workforce.

### **Smart Justice**

- Awarded \$50k from the Annie E. Casey Foundation in December 2020 and \$200k from the Clean Slate Initiative in March 2021. See programmatic work section for more details.
- Submitted a grant proposal for \$100k to the Chan Zuckerberg Initiative (CZI) to continue developing the Smart Justice Peer Learning Community and expect award announcement soon.
- Working with key staff at the Alliance for Safety and Justice to submit a request for a \$75k grant that has been verbally confirmed.
- Submitted a concept to key staff at the Schusterman Foundation around ACCE's smart justice work.

### **Career Readiness and Talent Pipelines**

- Developing relationships with staff at the Markle Foundation, whose work focuses on skills-based training and employment practices to help decrease bias and increase diversity in the workforce. There may be opportunities for joint funding proposals in the future.
- Developing relationships with the Citi Foundation. Citi's priorities include linking students' education and workforce goals with leadership training, professional networks and onramps to employment.
- Developing relationships with staff at the Mott Foundation. Mott's priorities include supporting STEM programs and developing STEM talent pipelines.

### **Healthy Communities**

- Submitted a concept to the Robert Wood Johnson Foundation on creating a new health communities cohort of ACCE members.
- Developing relationships with the de Beaumont Foundation, which is also interested in supporting healthy communities work around the country.

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

The benefits team continues its focus on the annual 401k compliance reviews, testing, and audit which is anticipated to run through end of May. The Benefits Trust search for an outside partner who can automate the per-pay period review of all contribution submissions continues to be a challenge, so the FBI staff is trying to identify new solutions to satisfy this need for the trustees.

New employer and employee communications campaigns will be designed and implemented beginning this summer with continued rollout through 2022 for all product lines. These will be a mixture of new training tools for both retirement and insurance administrators and refreshed educational campaigns for their employees. For the 401k plan there will also be a new custom link for the Principal Retire Secure Meetings (ACCE is only one of three Principal clients who have this!) which will assist the FBI staff and the Participating Employers in their efforts to increase participant engagement.

Phase one of the integration of FBI systems in the new ACCE database is in the final stages. We look forward to improvements as we move into the next stage of building a better engagement tool for staff and external users.

## 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	Sept. '20	USCC LEAD Conference	Panelist (virtual)	The Future of Chambers and Trade Associations
Sheree Anne Kelly	Sept. '20	AZ Chamber Execs	Speaker (virtual)	Horizon Initiative Update and Chamber Trends
Sheree Anne Kelly	Sept. '20	Mississippi EDC	Speaker (virtual)	Rethinking Revenue Models
Sheree Anne Kelly	Sept. '20	WI Chamber Execs	Speaker (virtual)	The Future of Chambers
Sheree Anne Kelly	Oct. '20	World Chambers Federation	Meeting (virtual)	Executive Committee and General Council meetings
Sheree Anne Kelly	Oct. '20	MIKI Chamber Execs (MI, IN, KY, IL)	Speaker (virtual)	The Future of Chambers
Sheree Anne Kelly	Oct. '20	Richardson Chamber (TX) Board Retreat	Speaker (virtual)	The Future of Chambers
Will Burns	Oct. '20	AARP Business Roundtable	Participant (virtual)	Update call with AARP and national business organizations.
Sheree Anne Kelly	Nov. '20	MACE/Midwest Chamber Execs (WI, MN, ND, SD, IA, NE)	Speaker (virtual)	The Future of Chambers
Sheree Anne Kelly	Nov. '20	Overland Park Chamber (KS) board retreat	Facilitator (virtual)	Facilitated strategic planning sessions held via two half-day meetings
Sheree Anne Kelly	Nov. '20	Baton Rouge Area Chamber board retreat	Speaker (virtual)	The Future of Chambers
Sheree Anne Kelly	Dec. '20	Irving-Las Colinas board retreat	Speaker (virtual)	Strategic Planning
Sheree Anne Kelly	Dec. '20	KS Chamber execs	Speaker (virtual)	Membership Trends and the Future of Chambers
Sheree Anne Kelly	Dec. '20	Loudoun County Chamber executive committee meeting	Speaker (virtual)	Chambers and Community Impact
Will Burns	Dec. '20	Pew/PSPP Partner call	Participant (virtual)	Coordination call for national organizations working on criminal justice reform.
Sheree Anne Kelly	Jan. '21	Affiliate Chamber of Commerce Chairs, Presidents & Executive Directors (IA)	Speaker (virtual)	Future of Chamber Value and Relevance
Sheree Anne Kelly	Jan. '21	Extraordinary CEO blog	Interview	Innovations and considerations for board governance

Sheree Anne Kelly	Jan. '21	Plano Chamber of Commerce board of directors	Facilitator (virtual)	Strategic planning retreat held in two sessions
Will Burns	Jan. '21	State Executive Association Network	Facilitator	Call with SEAN leaders to catch up and share strategies for 2021
Sheree Anne Kelly	Feb. '21	ICC-WCF	Member (virtual)	Executive Committee meeting
Sheree Anne Kelly	Feb. '21	ICC-WCF	Member (virtual)	Chamber 4.0 Task Force Workshop
Sheree Anne Kelly	Feb. '21	Danville Pittsylvania Chamber annual meeting	Speaker (virtual)	The Future of Chambers
Sheree Anne Kelly	Mar. '21	IA Assoc. of Chamber Execs Spring Conference	Keynote (virtual)	The Future of Chambers & Diversifying Income Streams
Anissa Starnes	Mar. '21	IA Assoc. of Chamber Execs Spring Conference	Presenter (virtual)	Retention, Recruitment, Renewals and Recovery
Sheree Anne Kelly	Mar. '21	Big Bear Chamber board meeting	Speaker (virtual)	The Community Impact of a Foundation
Sheree Anne Kelly	Mar. '21	Morrisville Chamber board meeting	Speaker (virtual)	The Future of Chambers
Sheree Anne Kelly	Mar. '21	Chattanooga Chamber board meeting	Speaker (virtual)	The Future of Chamber Value & Relevance
Sheree Anne Kelly	Mar. '21	ICC-WCF	Member (virtual)	Chamber 4.0 Task Force Workshop
Alysia Bell	Mar. '21	National Collaborative for Infants and Toddlers (NCIT)	Virtual	Participated as a member of the Movement Building Steering Committee
Sheree Anne Kelly	Apr. '21	MA Chamber execs annual meeting	Speaker (virtual)	The Future of Chambers
Sheree Anne Kelly	Apr. '21	Americans for the Arts	Webinar (virtual)	ArtsU Webinar: How to Partner with Your Local Chamber
Sheree Anne Kelly	Apr. '21	Fredericksburg Regional Chamber board meeting	Speaker (virtual)	The Future of Chambers
Sheree Anne Kelly	Apr. '21	USCC CCC100 Spring Virtual Meeting	Member	3-day event featuring topics & speakers: political affairs and federal relations
Anissa Starnes	Apr. '21	Chamber Association of Alabama	Webinar	The Power of Email Marketing for Chambers

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