



AMCs ENGAGED



People, Purpose, Progress

JULY 19-20, 2022

MGM GRAND

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AMCs ENGAGED SCHEDULE

Schedule Overview

MONDAY, JULY 18, 2022

12:00 - 8:00 p.m. Board Meeting & Leadership Dinner

TUESDAY, JULY 19, 2022

9:00 a.m. - 3:00 p.m. Registration

10:00 - 11:30 a.m. **Welcome and Opening Keynote:** *The Shortage Economy, Consumers, Employees and Voters: What It Means for Associations*

11:30 a.m. - 12:30 p.m. Networking Lunch

12:30 - 1:30 p.m. **Concurrent Sessions:**

- Accessibility & eLearning: A Guide For AMCs
- The A(mc) Team: Evolving Client Teams Into Special Force Units For Growth
- Considerations For Employees' Return To Office

1:30 - 2:00 p.m. Break

2:00 - 3:30 p.m. Hackathon: Client Scope Creep

3:30 - 4:00 p.m. Break

4:00 - 5:00 p.m. HIIT Sessions

5:45 p.m. Transportation Departs for off-site reception

6:00 - 8:30 p.m. AMCs Engaged Reception

WEDNESDAY, JULY 20, 2022

8:00 - 9:00 a.m. Breakfast

9:00 - 10:00 a.m. **Keynote:** *IMPACT: Establish a Culture of Excellence*

10:00 - 10:30 a.m. Break

10:30 - 11:30 a.m. **Concurrent Sessions:**

- Creating A Lean Data Analytics Approach
- From An Operational POV: Management, Sold What?!
- We Recognize The Importance of DEI, Now What?

11:30 a.m. - 12:30 p.m. Lunch

12:30 - 2:00 p.m. AMCs by Size

2:00 - 2:30 p.m. Break

2:30 - 3:30 p.m. People, Purpose, Progress...Where Do We Go From Here?

CAE CREDIT

AMCI is a CAE Approved Provider. AMCs Engaged programming meets the requirements for fulfilling the professional development requirements to earn or maintain the Certified Association Executive credential. As a CAE Approved Provider, educational program related to the CAE exam content outline, this program may be applied for **8 credits** toward your CAE application or renewal professional development requirements.

All attendees must self-report their CAE credit through ASAE. For more information about the CAE credential or Approved Provider program, please visit www.asaecenter.org/cae.



AMCs ENGAGED SCHEDULE

Tuesday, July 19, 2022

9:00 a.m. - 3:00 p.m. REGISTRATION

Grand Foyer

10:00 - 11:30 a.m. WELCOME & KEYNOTE

Salon 3

The Shortage Economy, Consumers, Employees and Voters: What It Means for Associations

Keynote Speaker: David Coletto

Abacus Data CEO and pollster David Coletto will deliver a data-filled, engaging briefing on what his research is telling him about the state of mind of Canadians and Americans as we emerge from the pandemic. He will focus on public attitudes towards work, the rising cost of living, and the political implications.



11:30 a.m. - 12:30 p.m. NETWORKING LUNCH

Salon 4

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12:30 - 1:30 p.m. CONCURRENT SESSIONS:

ACCESSIBILITY & ELEARNING: A GUIDE FOR AMCS

Sapphire Room

Presenter: Dan Streeter, Blue Sky eLearn

Whether used for training or revenue building, online learning and credentialing have rapidly become the lifeblood of professional and trade associations. With this increased emphasis in online learning, so too has the need to maintain compliance with laws ensuring accessible online learning for those with disabilities.

In this session, we will define what it means to deliver accessible online learning content, analyze a user experience from the lens of accessibility and the Web Content Accessibility Guidelines (WCAG) and create a plan to determine next steps to ensure conformance.

Not conforming with applicable accessibility laws and guidelines exposes AMCs and associations to legal risk; even more so, it excludes a large swath of online users with disabilities from accessing professional development opportunities. A fundamental part of most associations' mission is providing access to learning for all members, including members with disabilities.



LEARNING OBJECTIVES:

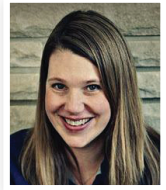
1. Identify the impact of the most recent laws, guidelines, and court decisions regarding accessibility to online learning for those with disabilities.
 2. Evaluate an eLearning experience from the lenses of conformance with the Web Content Accessibility Guidelines (WCAG 2.1)
 3. Receive resources for and create a plan to conform to WCAG 2.1 Guidelines
-

THE A(MC) TEAM: EVOLVING CLIENT TEAMS INTO SPECIAL FORCE UNITS FOR GROWTH

Salon 3

Presenter: Katie Keel, MPA, CAE, Bostrom

Mr. T said it best... “I pity the fool” who doesn’t utilize an AMC to their advantage! Client executives and department leaders experience unique challenges managing internal and external teams: volunteer turnover, technology constraints, managing multiple client teams, aligning teams with both client goals and the goals of the AMC, all while keeping teams motivated and focused. This Special Forces training will provide AMCs with tips, tools, and strategies on how to make their client teams more efficient and collaborative. If ‘Howling Mad’ Murdock and Lieutenant Colonel ‘Hannibal’ Smith are on your teams, learn how to leverage their strengths, diversity, and talents to fulfil client missions. Together, we will explore what unique challenges reside in AMC client team environments and what opportunities exist for clearly articulating what a path to success looks like for both the client and the AMC.



LEARNING OBJECTIVES:

1. Participants will learn how to apply effective client team management strategies, tools, and techniques in the AMC environment
 2. Participants will assess their own team strategies to identify key areas for growth opportunity and improvement
 3. Participants will learn how to align team management methods with annual client goals and AMC-driven culture and operational strategies
-

AMCs ENGAGED SCHEDULE

CONSIDERATIONS FOR EMPLOYEES' RETURN TO OFFICE

Garnet Room

Panelists:



Joy DesMarais-Lanz,
CAE, MA, CMM
Synergos AMC



Meg Moulden
Personify



Lane Velayo, CAE,
Synergos AMC

As association industry professionals, we are experts (or try to be!) at managing board relations. Therefore, we know that one size does not fit all! The same can be said as businesses consider how to get employees back in the office.

The goal of this session is to provide an “under the hood” vantage point of how Synergos AMC and Personify have implemented a hybrid-office environment and remote-first policy. Lane Velayo, CEO, and Joy DesMarais-Lanz, COO of Synergos AMC join Meg Moulden of Personify for a conversation about what has worked and what has not.

In this 60-minute session, we will share our respective experiences over the past 2 years. From employee supervision, soliciting feedback, building process scalability, and welcoming new staff, our goal is for attendees to walk away with a new idea to implement at their AMC, while also creating a forum for attendees to share their tips & tricks.

LEARNING OBJECTIVES:

1. Build understanding about the different employee personas and their work environment preferences
 2. Empower AMC staff to create a welcoming environment for all employees regardless of office location or remote-first culture
 3. Fostering employee engagement is essential to employee's investment in company's success
-

1:30 – 2:00 p.m. BREAK

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2:00 – 3:30 p.m. HACKATHON: CLIENT SCOPE CREEP

Through an active “Hackathon” format, the group will identify innovative ideas and solutions to improve AMC’s abilities to manage client scope creep.

Client scope creep has been plaguing AMCs for decades, and yet a framework for preventing and/or managing it has yet to be addressed industry-wide. Scope creep is not an isolated activity on its own. It is affected by our success (or lack thereof) in marketing, promoting and explaining ourselves to the client and ensuring their understanding not just of the AMC model, but also of our expertise and professionalism. There are many factors that may lead to an AMC “investing” time into the client; but when does “investment” turn into scope creep. The challenge, then, is to identify innovative ideas and solutions to address scope creep head on.

3:30 – 4:00 p.m. BREAK

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AMCs ENGAGED SCHEDULE

4:00 – 5:00 p.m. HIIT Sessions

Salon 3

Three individual sessions from the same stage (15 minutes each)

HIIT SESSION #1: STEPS TO SUCCESSFULLY IMPLEMENT A PROJECT MANAGEMENT PLATFORM

Presenter: Mary Beth Kiser, CAE, Strategic Association Management



We all know that project management is important to executing a scope of services for our association partners. For AMCs a common project management platform is critical, but that is just the beginning. Getting teams to buy in and actually use the tool is crucial for an organization with many teams and client partners. In this session, we'll walk you through the steps our group took to identify and implement the project management tool ASANA. Though we had purchased ASANA several years ago, there was not wide-spread acceptance by all staff members. I want to share how our process for engaging management trickled down to individual employees and how we got to 100% usership. While the process was for ASANA, the key ideas are helpful for initiating and engaging staff around any kind of project management system.

LEARNING OBJECTIVES:

1. How to identify the tools that work for your team.
2. How to engage management around common tools.
3. How to engage teams around common tools.

HIIT SESSION #2: HELP ME, HELP YOU! KNOW YOUR WORTH & LEVERAGE YOUR PARTNERSHIPS

Presenter: Jen Voshell, Loews Hotel, Universal Orlando Resort

"Buying Power" isn't just for day traders and Wall Street Gurus. Now more than ever, AMCs should leverage not only their relationships but also their buying power. This session will ensure both leadership and emerging leaders understand the existing leverage of their AMC as a "buyer" and provide tips for maximizing that buying power within the AMC supplier partner community to help your AMC and clients turn bigger profits.



LEARNING OBJECTIVES:

1. To ensure you have a full understanding of your AMC/Individual Client Associations' worth within your partner community.
2. Ways to leverage your existing relationships to capture more clients and to save you, and your clients, time and money.
3. Best practices to ensure the provider partners you want to work with know your worth.

HIIT SESSION #3: WORDS HAVE POWER

Presenter: Sarah Timm, CAE, CMP-HC, Parthenon Management Group



Diversity, equity and inclusion language is a key learning to any AMC effort in educating ourselves and our teams. Words are powerful and better understanding the origin of words can help reshape your approach and improve communication. This HIIT will review the cultural identity many associate with language. We will review the origins of words that we use everyday and how they may impact minoritized individuals. We will also address better language to ensure gender inclusivity.

LEARNING OBJECTIVES:

1. Better understand how the origins of words can impact your communication.
2. Learn first person language.

5:45 p.m. TRANSPORTATION DEPARTS FOR OFF-SITE RECEPTION

6:00 – 8:30 p.m. ENGAGED RECEPTION

Madison Building

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Wednesday, July 20, 2022

8:00 - 9:00 a.m. BREAKFAST

Salon 4

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9:00 - 10:00 a.m. KEYNOTE: IMPACT: ESTABLISH A CULTURE OF EXCELLENCE

Salon 3

Keynote Speaker: Antoine Bryant, NOMA, Assoc. AIA, APA

There is a specific and definitive causal relationship between progress and excellence. As we collectively move organizations, team members, and individuals to align themselves with industry goals and move aggressively forward, clearly and firmly establishing direction in an optimum sense is necessary. When a Culture of Excellence is established, nurtured and promoted, it leads to an inspired and dedicated workforce.



Antoine has directed staff and empowered communities across the country and is dedicated to the strengthening of all. Our conversation will result in individuals who will be recharged and focused more than ever on delivering EXCELLENCE.

10:00 - 10:30 a.m. BREAK

Grand Foyer

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**10:30 - 11:30 a.m. CONCURRENT SESSIONS:
CREATING A LEAN DATA ANALYTICS APPROACH**

Garnet Room

Presenters:

*Wendy-Jo Toyama,
MBA, FASAE, CAE*



*Hans Zetterstrom,
MSC*



Continued on next page

Exceptional boards make data-based decisions, and AMCs need to consider how to help their clients make sense of their data. This session will review an approach for BI and data analytics from two sides, the client and the AMC. Data analytics projects can be costly for an association to afford alone; an AMC accesses economies of scale across multiple clients to offer cost-effective solutions. A client chief staff executive will share how the team evaluated program needs and staffing to create a data analytics position. In parallel, the AMC CIO will share how they are developing a multi-phased lean approach to the collection, transformation, and storage of data to make effective decisions and bring additional insight from overall available industry data. We'll discuss near and long-term goals, barriers, and opportunities. This session will bring the two perspectives together through a holistic approach to data management and analysis and set a path toward breaking down those data silos.

Learning Objectives:

1. Analyze how a data analytics approach could be of value for its clients and develop a data analytics role on its team.
2. Decide what are short and long-term project considerations and how to approach each using a lean, iterative process.
3. Identify barriers to creating a data analytics approach, strategies to address them and incremental ways to measure success.

FROM AN OPERATIONAL POV: MANAGEMENT SOLD WHAT?! *Sapphire Room*

Presenters:

*Fran Rickenbach, CAE,
IOM*



Roxy West, CAE



Management sells a client on a great idea... and then turns to you to make it work. This interactive session will provide case studies of what was sold and what was delivered and then give participants a chance to brainstorm how they can manage up to ensure that expectations are realistic - and solve a current delivery expectation. Be prepared to learn, laugh, and come away with concrete solutions you can use with you management and clients.

Learning Objectives:

1. Identify the underlying goal of a proposed project to ensure that the deliverables DO meet the goal.
 2. Develop important skills to manage your manager - and ensure that you can deliver an appropriate result.
 3. Assess options to provide optimal return on your investment of time - including those your manager may not know about or have considered.
-

AMCs ENGAGED SCHEDULE

WE RECOGNIZE THE IMPORTANCE OF DEI, NOW WHAT?

Salon 3

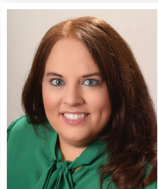
Presenters



Gene Terry, CAE, IOM



Bob Waller, CAE



Amy Williams, CAE, MPA, IOM

Is your organization committed to ensuring diversity, equity, and inclusion but aren't sure where to start on your diversity, equity, and inclusion journey? This session will challenge you to consider how you can assess, infuse and measure DEI in every facet of your AMC and help your clients do the same.

Several of Association Headquarters' "DEI Champions" will share what AH has done as an AMC, how its clients and other organizations are implementing DEI initiatives, and will facilitate idea sharing amongst session participants to learn together what is being done to infuse DEI across all areas of our organizations, including:

- Human resources
- Mission, strategy, and governance
- Board and volunteers
- Chief Staff Executive
- Membership
- Credentialing programs
- Programs and events
- Marketing and communication
- Advocacy efforts
- Vendors and suppliers
- Industry/profession

Learning Objectives:

1. Share research and best practices on association DEI strategies, metrics and measures.
2. Provide key takeaways and action steps for each area of consideration.
3. Explore the challenges and successes attendees are facing implementing DEI efforts at their own organizations.

11:30 a.m. - 12:30 p.m. NETWORKING LUNCH

Salon 4

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12:30 –2:00 p.m.

AMCs by Size

Please be aware some of the “By Size” categories have shifted slightly below. Please keep this in mind when participating in this session. We respectfully ask that all members attend the AMCs by Size session that correlates to your current firm size only. This year at AMC Engaged, we encourage all Account leaders and AMC staff to participate in conversations with their firm leaders. Provider Partners/Associate Members are not permitted to attend AMCs by Size.

SMALL (1-5 EMPLOYEES)

Amber 2

MEDIUM (6-15 EMPLOYEES)

Garnet

*Ruth Abrahamson,
Base Consulting
and Management, Inc.*



*Megan Woodburn,
CAE, Strategic
Association
Management*



LARGE (16-49 EMPLOYEES)

Sapphire

*Nick Ruffin, CAE
AMR Management
Services*



*Kirsten Reader,
Impact Association
Management*



AMCs ENGAGED SCHEDULE

EXTRA LARGE (50+ EMPLOYEES)

Salon 3

*Mike Dwyer,
CAE,
Association
Headquarters*



*Sarah Timm,
CAE, CMP-HC,
Parthenon
Management Group*



2:00 – 2:30 p.m. BREAK

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**2:30 – 3:30 p.m. PEOPLE, PURPOSE, PROGRESS...
WHERE DO WE GO FROM HERE?**

Salon 3

Leveraging the best of our AMCs – our people and purpose – to make progress in our communities begins today. Through a moderated panel discussion, we'll explore the key themes that emerged through AMCs Engaged 2022, highlighting where we as AMC leaders can take concrete action to move our businesses and association clients forward.

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Committee Chair

Molly Marsh, CMP, AMR Management Services

Committee Chair-Elect

Ruth Abrahamson, Base Consulting and Management, Inc.

Committee Members

Monica Evans-Lombe, CAE, MCI USA

Jackie Kavcak, Tourism Vancouver

Rachel Luoma, CAE, Partners in Association Management

Adam McKeivier, CAE, Strategic Association Management

Molly Mullins, SEVEN12 Management

Kirsten Reader, Impact Association Management

JoAnn Taie, Global Management Partners, LLC

Lindsay Smith, Personify

Todd Von Deak, MBA, CAE, TVD Associations, Inc.

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THANK YOU TO ALL OF OUR LEADERSHIP CIRCLE MEMBERS:

Gold Level



Silver Level



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SAVE THE DATE

FOR FUTURE AMCI MEETINGS

AMC Institute Annual Meeting

January 25-27, 2023 ▪ Caribe Royale | Orlando, FL



AMC Institute AMCs Engaged

June 6-7, 2023 ▪ Omni Oklahoma City | Oklahoma City, Oklahoma



