



AMERICAN MARKETING  
ASSOCIATION

San Diego

# 2016-2017 CEA ENTRY



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# EXECUTIVE SUMMARY



AMA San Diego is a longtime thriving chapter that has experienced huge growth over the last several years on many different fronts. Our hard-working board is dedicated to developing powerhouse marketers in San Diego, and we do that by delivering relevant value to our members and partners every day. We've had plenty of success this year due to the creative talents and industrious nature of our board members and volunteers.

For example, during the 2016 Fall Membership Campaign, we snagged the No. 1 spot in membership growth for our chapter cohort, and we came in No. 3 across all chapters. Our communications efforts continue to amaze us—email open rates are up 13%, blog post views have increased over 60% and social media engagement has risen 17%. Our programming is robust. In FY2016-2017, we put on seven signature events, two mixers, twelve special interest group (SIG) events, two partnership events and one conference. We also established a new long-term partnership with two highly respected organizations in San Diego to plan and co-host the region's Cause Conference.

Some of our greatest achievements, however, came from facing very difficult situations and pivoting quickly. Thanks to the significant talents and agility of our board volunteers, we tackled these challenges and empowered our volunteers to come out on the other side as a stronger, supportive team.

Every chapter goes through its ups and downs. Still, what sets us apart is how we dealt with the roller coaster. As part of our goals for this year, we focused on member and sponsor value. Virtually every decision we made was in service to these goals. We took a hard look at our financials, our programming attendance, and board turnover as well as volunteer burnout, and we addressed each one of these challenges with practical solutions. We also put processes in place that will make it easier for the board in the next fiscal year.

### **CPA Puts Our Financial House in Order**

After we experienced a financially strong and recuperative FY2015-16, our chapter was positioned for continued growth in FY2016-17. We had two primary financial goals. One was to grow our reserve account from \$300 to \$1,300, which we achieved. The other was to end the year with \$48,000 in our checking account, which we did not.

While our sponsorships, although down, were still strong, we attribute the revenue gap primarily to lower cash sponsorships and lower revenue from two issues related to programming. First, we made a strategic, calculated decision to delay a major revenue-generating event, the Cause Conference, so that it would take place outside the fiscal year. Second, our overall programming attendance was down.

Our newly ratified C&Bs did prioritize financial stability, putting in place required expense approvals, reserve accounts, and event-specific budgeting. But we needed more than that.

To turn things around, we looked to the Board in a Box best practice and elected a CPA as Treasurer a few months into our fiscal year. Prior to FY2016-17, we had a VP Finance managing our books. But due to the size of our chapter and our events, the task of handling our financials had grown to a new level requiring CPA expertise. This would keep our chapter financially prepared and sustainable for the long term as well as within compliance of our 501(c)3 tax exemption status and AMA affiliation.

Hiring a CPA brought so much more to our organization. She not only put our financial house in order, but she also refined our chapter's accounting categorizations, processes and policies. In addition, she helped us establish fiscal restraint and improve forecasting for the chapter and individual events. Here's how:

- **Financial KPI Dashboard:** Our CPA implemented a new financial KPI dashboard to measure and track cash balances, revenue, and expenses.

- **Budgeting and Forecasting:** Each month, our chapter got a clear picture of profit and loss vs. budget with detailed breakdowns for our programs and large events. Our CPA provided financial modeling and analyses to help us plan for the future, reduce the risks of any financial shortfalls, and navigate through unexpected financial circumstances.

Because of significant improvements we made with forecasting and budgeting, we were able to diminish the financial dip and significantly reduce our net loss halfway through the fiscal year. Of course, hiring a CPA put our programming under the microscope.

The good news is our new VP Programming, who filled a vacancy mid-year, was already being groomed for succession at the turn of the year and took things in stride. From the outset, she came in armed with in-depth analyses of programming revenue, attendee surveys, and secondary insight sources (e.g., member demographics), enabling her to adjust program planning by organizing more profitable events during the second half of the year. This not only minimized any further losses for the chapter, but it generated more revenues with improved program offerings and ultimately enhanced member and partner value.

### **Mitigating Volunteer Burnout**

In the last five to six years, our chapter added many large initiatives to our portfolio including three special events (two conferences, one awards banquet). At the same time, AMA San Diego has been testing various solutions—with varying levels of success—to alleviate volunteer burnout in recent years. Despite our best efforts to resolve volunteer fatigue, it remained a challenge. It was becoming harder for overtasked volunteers to help out and for our board volunteers to effectively manage.

This prompted AMA San Diego to make one of the most important and consequential decisions in our chapter's history. We decided to share ownership of a flagship event we had managed for 19 years, the Cause Conference, with other organizations. We also pushed back the date of the 2017 conference partly to give our volunteers some breathing room in the interim.

While the conference had been a major event for us and a key revenue driver, its programming focus—cause marketing for nonprofits and purpose-driven businesses—was very niche and not closely aligned to the current needs of most of our members or partners. We came to the difficult conclusion that it no longer made strategic sense to allocate a huge portion of our time and resources to this event long term, especially considering the priorities and initiatives of the Next AMA.

After soliciting input from key Cause Conference leaders, the cause and nonprofit community, chapter board members, our Advisory Board and AMA members, we implemented a two-phased solution to address the issues while ensuring the Cause Conference could grow and continue to benefit the community:

- **Short-Term Solution: Find a Partner.** Over the course of nine months, we vetted more than 15 community-oriented organizations with a key objective of identifying potential partners interested in sharing the role, risks, and benefits of hosting the conference. We eventually found a good fit with Conscious Capitalism SD (CCSD), a chapter of Conscious Capitalism Inc. The San Diego Nonprofit Association also joined the partnership. With a common value on purpose and community impact, our three organizations are co-hosting the Cause Conference in September 2017.
- **Long-Term Solution: Transfer Conference Ownership.** For 2018 and beyond, CCSD is likely to attain majority—if not full—ownership of the Cause Conference while AMA San Diego continues to be minimally involved and enjoy the benefits of being a track host and cross-promotional partner.

Moving the Cause Conference to the following fiscal year affected our financials for 2016-2017, but the benefits were worth it. Now that we're sharing the load of managing this conference, our volunteer base is no longer stretched thin.

### **Upping Our Game in Succession Planning**

Another significant challenge we faced this year was the transition of four board members in critical roles, including the VP Event Programming, VP Event Experience, and VP Membership. Two board members had health matters, while two others left for out-of-town career advancement, which is, unfortunately, common in the San Diego job market. In fact, [Forbes recently ranked](#) San Diego as the sixth hardest city in the United States to find a job, in particular jobs that pay over \$50,000.

As a result, finding great marketing leaders and retaining them can be particularly tough. Still, our team looked at this as a reason to refocus and improve our succession planning in the following ways.

- **Recruitment of senior-level professionals:** We focused on developing a board of senior-level professionals with strong leadership experience. Board members were encouraged to serve as leaders so they could grow and empower a team of volunteers to execute the vast majority of tasks. This accomplished two goals: it alleviated board member burnout and created a pipeline of potential new board members.
- **Job description bank:** Virtually every single position type—board member and volunteer—had a job description with clearly articulated roles, responsibilities and time expectations. This year, we created a job description bank in Google Drive that made it easy to copy, paste or modify job position descriptions for future use.
- **Volunteer Onboarding Kit updated:** Our Volunteer Onboarding Kit gives volunteers key resource and contact information, and describes the value in volunteering and the opportunities and benefits it presents. It also shares some of our rich history and how our award-winning chapter thrives.
- **Documenting best practices:** To support transitions in the near- and long-term, outgoing and incoming board members have started documenting their processes and best practices and creating templates (or utilizing those from AMA Chapter Resources portal), which keeps us from having to reinvent the wheel.

Ultimately, it came down to being prepared for the inevitable—health, family or career advancement may require members to tender resignations to the board. But now, with better processes in place, we're able to implement leadership solutions when sudden vacancies arise.

### **Driving Membership Without a VP Membership**

As mentioned earlier, AMA San Diego suffered a setback when we lost our VP Membership at the very beginning of the fiscal year. It took us several months to backfill that position as the incumbent hadn't had the chance to grow a team and groom potential successors. The good news is our chapter had prioritized membership and uses Board in the Box practices to successfully execute membership acquisition efforts (e.g., campaigns) and retain members.

We continued to thrive because of practices such as getting all board members to include member recruiting and retention in their job descriptions and having easy-to-access membership collateral and a strong value proposition at their disposal. The communications team and executive leadership in particular went above and beyond to close the gap and ensure continued success. The result?

- **We triumphed in the Fall Membership Drive:** We came in No. 1 in our cohort for the Fall Membership Drive, and No. 3 in actual growth for all chapters.

- **We grew and retained membership:** We grew our total membership by 6.5%. We ended the year with 302 members, just two shy of our goal of 304. We ended the year with 42% membership retention. We also grew our total number of group members to 50+ and we retained our existing group members at rate of over 90%!
- **We enhanced member benefits:** We offered a 50% discount for many events (which was highly effective in driving new memberships) and the Preferred Marketers Directory (a high-priority listing for members).
- **We conducted a Marketing Leaders Study:** Our VP Corporate Engagement worked in partnership with one of our sponsors and met with corporate marketers (directors, VPs and CMOs) at 30 companies in the San Diego region. At these meetings, he reintroduced them to AMA San Diego as part of our Marketing Leaders Study - The State of Marketing in SD. The outcome of this effort is twofold. First, this study gave us an “in” and a benefit to execs at top brands who also were exposed to the value and benefit of AMA membership and then converted. Second, we will compile and share a 50-page study with AMA San Diego members in early 2017-2018.

So despite not having a VP Membership to guide us for the first two to three months of the fiscal year, our chapter used best best practices, implemented innovative new benefits, and experimented with email automation and still came out ahead.

### Other Successes

Not all of our successes resulted from handling tough situations and living to tell the tale. Many of our achievements came about from our zeal to keep improving. Here are some wins that showed that our chapter is dedicated to providing member and partner value:

- **Launched the Preferred Marketers Directory:** We launched a directory of the region’s leading marketing service providers to help pair businesses with highly regarded, quality marketing service providers. In an effort to deliver value and exclusivity, the directory prioritizes sponsors, members and partners.
- **Rocked digital marketing:** We published 33 Knowledge posts (mostly blogs and podcasts) this fiscal year—a little over two a month—and increased Knowledge pageviews by 60%. We pushed email open rates up to 13% and effect rates up to 5%, and increased our social media engagement by 17%!
- **Made more sense of our marketing investments:** We made valuable progress in effectively tracking conversions, especially from paid channels like social media ads, using UTM codes and analyzing performance in Google Analytics. Now, we can better and more effectively evaluate a tactic’s influence on a goal across all marketing channels. We can also better allocate time and resources to the tactics that have the greatest effect on our goal.
- **Created a VP Recognition:** We added a new board position to emphasize the importance of tracking the success of our chapter through our improved KPI dashboard, helping the President to recognize the valued contributions of individuals, and continuously developing components of the CEA throughout the fiscal year. This made the process of compiling the final CEA much more manageable after the chapter submitted an incomplete CEA for FY2015-2016.
- **Sent five board members to the Regional Retreat and Leadership Summit:** We were able to invest in sending a third of our board to these highly valuable professional development events to learn best practices from other chapters and leaders in marketing. Seen as an investment in our organization and board members, this was the largest group we’ve sent in known history.



- **Implemented a new project management tool:** We transitioned from Basecamp to Asana after successfully piloting it during planning for the Art of Marketing conference. The tool has helped to streamline task-oriented projects, big events and multi-team projects. It has also helped expand visibility and understanding of cross-committee efforts and dependencies.
- **Went international:** With the continued growing interest of the Hispanic Marketing SIG, we hosted a sold-out trip across the Mexican border for some insightful local market education and networking in Tijuana and the beautiful Valle de Guadalupe wine country.
- **Ratified updated C&Bs:** This is the first time our chapter had modernized our core processes and decision-making in *more than 25 years*, and this had a huge impact on our chapter management and operations, including financials and digital voting. It also alleviated many critical areas of confusion for the chapter, and it closed a massive risk for our chapter's tax-exempt status and AMA affiliation.
- **Prepared for the launch of our new brand identity:** We recruited a VP Brand Management to implement the rebrand plan, engage partners, secure in-kind donations, and attract dedicated volunteers to help launch our new brand and deliver on its promise. Deliverables and tasks were entered into Asana to track the three-phased approach of preparation, design and development, as well as the brand launch. The unveiling and launch of our new chapter identity was strategically timed to coincide with a content-based rebrand educational and rebrand celebration on July 25, 2017 (the first event of the 2017-2018 board year).

We're proud of what we've accomplished this year. With better processes and resources in place and a strong, diverse leadership team, we know we're always ready to take on new challenges. We've shown that we can handle any obstacles placed before us and continue to thrive. And to be honest, if our chapter had glided throughout the year without having to address a single issue, then I would say we didn't challenge ourselves enough.

It has been an honor to serve as AMA San Diego's chapter president. I started my two-year term inspired by the tireless efforts and creative focus that the board, volunteers and partners collectively brought to the table to fulfill our mission. I leave my term even more grateful, appreciative, and proud of everything they have achieved. On behalf of the AMA San Diego board, I humbly submit our CEA for your review.