



American Marketing Association  
Oregon Chapter  
2008-2009  
Chapter of Excellence Awards Entry



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## Executive Summary

When our leadership team planned our 2008-2009 board year we ambitiously set our sights on a broad array of goals, new programs, higher program attendance, and more sponsor dollars. We were positioned to raise ourselves in the eyes of the marketing community. As news of the recession loomed, we peered into the murky future and sought the best path for our members and our community. Our “One Vision” guided our actions and our success.

### Our unified vision:

- Focus on a cash-positive position for the year  
Our chapter will be fiscally responsible. In light of less than positive economic news, we will cut excess spending and focus revenue building opportunities while keeping our pricing obtainable for our members.
- Provide top-tier programming  
Programming is the tangible demonstration of an AMA membership. We will bring our members timely and relevant content. We’ll also provide opportunities for networking and practical methods for career advancement.
- Strive for flawless execution  
We will focus our attention on the member experience. Our events must be executed in a manner our members have come to expect for the AMA Oregon Chapter. We will also respect our member’s time by starting and ending our programs on time.
- Grow our chapter through high-touch membership retention and acquisition  
We know that our members join the AMA to grow personally and professionally. To help our members get the most from their membership’s we will stay in touch frequently and validate their decision for being an AMA member.
- Cultivate relationships with key sponsors and industry leaders  
Our sponsors and key industry leaders help us to make our chapter run. Beyond financial support our marketing community helps us provide current content and top level industry speakers.

### Our results:

As a result of our efforts, we ended our chapter year on a high note. We foresaw and avoided potential risks while navigating with cautious optimism. We demonstrated that the AMA Oregon Chapter is the premier marketing association serving Oregon and SW Washington. We are the inheritors of a legacy cultivated over 50 years and we have done our part to ensure the chapter maintains its reputation for 50 more.



- **Cash position**  
Our chapter worked extremely hard to keep our financial vision in place. Although we ended the year in a negative cash position, we decreased our board expenses by 50%. Additional expense reducing measures included:
  - Complete review of chapter operating costs, bank and investment accounts.
  - Changing venues and securing advantageous group pricing.
  - Nominally increasing program costs to generate revenue.
  - Postponing our 50<sup>th</sup> Anniversary Celebration & Special Interest Group rollout.
  - Reducing board expenses of chapter meals and events.
  - Encouraging each team to leverage relationships to acquire sponsors.
- **Programming**  
Our programming team brought our new energy to our events this year. New formats and unique concepts really allowed us to better position our chapter as *the premier marketing association in Oregon*.
- **Chapter management**  
A board of our size is difficult to manage but our team did not let that stand in their way. Our committees were strong and worked well together. From our success we were able to begin recruitment of future chapter leaders much sooner than in years past.
- **Membership retention and acquisition**  
Our membership team worked hard to retain new members even though many obstacles were in the way. By having a seasoned AMA Past-President in the lead position, we were able to focus on new ideas and strategies that will carry us into 2010 and beyond.

**Lessons Learned:**

- **Board management**  
To help better manage our chapter we are reducing the size of our chapter leaders for the future. This will make it easier to run board meetings and execute our chapter plan.
- **Expense management**  
We did an amazing job on managing expenses. Moving forward this will be the standard for our chapter operations. This will ultimately benefit our members.
- **CEA planning**  
Our CEA planning should begin with our first board meeting of the year. This makes it easier to capture our wins and lessons learned. It will also help us to benchmark our progress toward our goals.



## Leadership Summary

### Vision & Succession Planning

Provide premier professional development and educational resources for marketing professionals in the Portland and SW Washington areas.

To achieve our mission, we will:

- Offer members valuable, topical programming on marketing issues and successful strategies.
- Excel members' acquisition of skills and knowledge for personal and professional success.
- Communicate and promote marketing as an integrated business philosophy.
- Facilitate networking opportunities and expose our members to new ideas and business contacts.

### 2008-2009 AMA Oregon Board List

#### Leadership/Chapter Administration

President	Chylon Pappas
President-Elect	Cris Schulz
Immediate Past President	Eric Gregg
Treasurer	Scott Hall
Secretary	Janee Cazier
Chapter Administrator	Janet George
Historian	Lisa Olson
Sponsorships	Michael Thompson
Communications Co-Chair	Erica Poff
Communications Co-Chair	Orit Kramer
Public Relations*	Casey Boggs
Research	Alice Bronnert
CEA	Kathy Hartshorn

#### Membership

Membership	Christine Morgan
HR/Volunteer Coordinator	Position Unfilled
Community Outreach Co-Chair	Gillian Kennedy
Community Outreach Co-Chair	Tracy Streebel

#### Programming

Programming Co-Chair	Andy Van Oostrum
Programming Co-Chair	Genny Fruechtel
Professional Development Co-Chair	Russ Yost
Professional Development Co-Chair	Pamela Singleton
MAX Awards Co-Chair	Monica Santi
MAX Awards Co-Chair	Kevin Hohnbaum
Annual Conference*	Jessica Legg
Networking*	Brian Wright



**Elect Positions**

Our elect position for the year was our President-Elect Cris Schulz.

**Strategy for Recognizing Volunteers**

- |  |             |
|--|-------------|
| • Board members stand at monthly membership/program events                   | Planned     |
| • Express thanks for outstanding achievements and service at board meetings  | Planned     |
| • Execute recognition events with volunteers to plan and celebrate successes | Spontaneous |
| • Email notes of recognition to volunteers and board members                 | Spontaneous |
| • Volunteer appreciation event   | Planned     |
| • Discounted or ‘comped’ event attendance                                    | Planned     |
| • Volunteer of the Year award  | Planned     |
| • Committee meetings/meals   | Spontaneous |
| • Board benefits package   | Planned     |

**Board Benefits and Board Commitment**

Our board members get significant benefits from being a part of our team. At the beginning of our chapter year we review these benefits and get a commitment agreement from each board member to make sure we are all on the same page.

**Board Turnover**

During the board year, the chapter had turnover in the following areas. Turnover was due to significant life changes.

<b>Committee Impacted</b>	<b>Board Member</b>	<b>Board Action</b>
Membership Co-Chair	Andi Koegler	Christine Morgan covered position as committee Chair
Sponsorship Co-Chair	Jennifer Gibbings	Michael Thompson covered position as committee Chair
HR/Volunteer Co-Chair	Viktoria Jaycno	Position covered by Chylon Pappas & Kathy Hartshorn
HR/Volunteer Co-Chair	Cicely Tyler	Position covered by Chylon Pappas & Kathy Hartshorn

These board members left our team due to significant life changes.

**Survey of Volunteers**

We include volunteers in our annual survey to ensure their needs are met. The survey focuses on what drives membership, volunteering and engagement and is the basis of the strategic planning throughout the year.

See Appendix I: Board Benefits & Board Commitment Forms



## Volunteer Roster

### Board of Directors

Chylon Pappas	President	Cris Schulz	President-Elect
Eric Gregg	Immediate Past President	Scott Hall	Treasurer
Janee Cazier	Secretary	Lisa Olson	Historian
Michael Thompson	Sponsorships	Erica Poff	Communications Co-Chair
Orit Kramer	Communications Co-Chair	Casey Boggs	Public Relations
Alice Bronnert	Research	Christine Morgan	Membership
Tracy Streebel	Community Outreach Co-Chair	Gillian Kennedy	Community Outreach Co-Chair
Andy Van Oostrum	Programming Co-Chair	Genny Fruechtel	Programming Co-Chair
Pamela Singleton	Professional Development Co-Chair	Russ Yost	Professional Development Co-Chair
Kathy Hartshorn	CEA Manager	Monica Santi	MAX Awards Co-Chair
Kevin Hohnbaum	MAX Awards Co-Chair	Jessica Legg	Annual Conference
Brian Wright	Networking		

### Support Team

Lindsay Abbott	Social Media/Communications	Daniel Payne	Webmaster/ Photographer
Ode Minton-Smith	Communications	Richelle Elsner	Networking Team- Logistics
Mike Russell	CEA Copywriter	Elana Stone	OSU Chapter Liaison
Matt Schaffer	Collegiate- PSU Chapter Liaison	Florence Chan	Collegiate- PSU Chapter Liaison

### Conference Volunteers

Kelly Vanderzanden	Logistics Director	Joe Walters	Event Producer
Tiffany Rahimian	Hospitality Coordinator	Rita Ogbeama	Logistics Coordinator
Jodi Kansagor	Traffic Coordinator	Nathan Wagner	Sponsorship Director
Jillianne Shellan	Cash Sponsorship Coordinator	Carmen Endrina	Cash Sponsorship Coordinator
Jason Meyers	Programming Director	Allison Park	Programming Coordinator
Robb Crocker	Video Sponsor Contact	Erika Kirkland	Copywriter
Jenn Lackey	Copywriter	Taraneh Foster	PR/Media Coordinator
John Henry Angell	Pre-Press Producer		



### MAX Volunteers

Marcella Zink	Max Committee	Bill Dolan	Event Producer
Jessica Greenwood	Max Committee	Anne DeRock	Max Committee
David Kaiser	Max Committee	Rich Stevens	Max Committee
Kim Fraizer	Max Committee	Brooks Gilley	MAX Judge
Gregg LeBlanc	MAX Judge	Leo McLeod	MAX Judge
Michele Daterman	MAX Judge	Debra Ringold	MAX Judge
Tim Cobb	MAX Judge	Lee Wenstein	MAX Judge
Tom Eliand	MAX Judge		

### Community Outreach

Erica Bruhn	Spoon- Project Manager	Jessica Brandes	OCB-Project Manager
Meg Kaczyk	Spoon- Art Director	Joel Ehly	OCB-Copywriter
Sarah Shroyer	Spoon- Student	Andrea Weeks	OCB-Student
Kate Bouteiller	Spoon- Grassroots Events	M. Blake Nichols	OCB-Mktg Strategist
Stephanie Marmor	Spoon- Intn'l & General Mktg	Toto Vo	OCB-Web Strategist
Kara Goldhamer	Spoon- Email/Online Mktg Strat	Dan Brumfield	OCB-Print Design/Web Media
Brian Schatz	Spoon- Research & Video	Daniel Rossi	OCB-Designer/Researcher
David Ingram	Spoon -Copywriter	Julia Dyszy	EWB - Project Manager
Bridget Harper	Spoon -Graphic Designer	Sean Canton	EWB-Copywriter
Marcella Zink	EWB-Events	Spencer Helm	EWB-Researcher
Nika Anderson	EWB-Student	Anne Sawallich	MECM- Project Manager
Chris Ehrlich	EWB-PR	Stephanie Wagner	MECM- Graphic Designer
Ziggy Kopetti	EWB-Marketing Strategist	Brian Wong	MECM- Student
Dean Rivet	EWB-Graphic Designer	Rebecca Heathcock	MECM- Copywriter
Jackie Scherer	OFB- Project Manager	Bobbie Parisi	MECM- Marketing Strategist
Ty Stober	OFB- Marketing Strategist	Elizabeth Duong	BFOF-Project Manager
Julie Randall	OFB- Copywriting	Erika Kirkland	BFOF-Events
Kate McCullough	OFB- Web Strategist	Doralisa Palomares	BFOF-Copywriting
Shiori Mori	OFB- Student	Cheryl Nee-Gieringer	BFOF-Marketing Strategist
Jennifer Arend	OFB- Graphic Designer	Robyn Birkedal	BFOF-Student
Andrea Roberts	OFB- Events	Cheryl Kanekoa	BFOF-Researcher
Jeff McHugh	TRC- Project Manager	Whitney Lawrence	BBBS-Project Manager
Brook Parker	TRC- Copywriter	Nicole Mercer	BBBS-Student
Aleta Fullenwider	TRC- Researcher	Andrew Hryciw	BBBS-Marketing Strategist
Will Ashworth	TRC- Web Strategist	Melissa Utz	BBBS-Web Strategist
Bill Mikesell	TRC- Student	Tracy Quiring	BBBS-Graphic Designer
Ashley Carter	TRC- Graphic Designer	Adam Wisniewski	BBBS-Copywriter
Laurentiu Lovan	TRC- Programmer/QA/Tester	Jacob Beck	BBBS-PM Support and Events
Coryna Sorin	OHS-Project Manager	Ben Bradley	BBBS-Programmer/QA/ Tester
Dima Raber	OHS-Copywriter	Tyesha Snow	BBBS-UE Architect/Info Strategist
Hayley Kimble	OHS-B2B Fundraising Specialist	Erin Halley	BUF-Project Manager
Corrina Kotsovos	OHS-Marketing Strategist	Estelle LeBlanc	BUF-Web Strategist
Kelsey Chinen	OHS-Student	VACANT	BUF-Art Director/Graphic Designer
Marilen Jaramillo	OHS-Researcher	Kim Toomey	BUF-Copywriter



Jeff Fawcett	OHS-Strategy and research	Tary Kaylor	BUF-Marketing Strategist
Matt O'Meara	OHS-Graphic Designer	Courtney Nelson	BUF-Student
Tracy Streebel	BTA- PM	Huch Heinsohn	Cnt Dev/Mktg Strat/Audio-video
Glenn Scott	BTA- Web Strategist	Mike Terry	Marketing Plans and Strategy
Joel Barker	BTA- Copywriter	Erin Lebsack	PR and Messaging
Kristin Wille	BTA- Graphic Designer	Evan Davies	General marketing
Linda Tom	BTA- Marketing Strategist	Becky Leung	PR
Jacqueline Aliotti	BTA- Event Strategy	Shane Sasnow	Group Facilitator
Joseph Clock	BTA- Marketing Research	Courtney Ries	BTA- eMktg/Event/Copywriting
John Sauer	BTA- PR		

### AMA Oregon Chapter Volunteer Statistics

- Board: 24
- Committee/ Community Outreach: 126
- Volunteer of the Year: Lindsay Abbott

### Collegiate Community & Outreach Programs

Our collegiate and community relationships set the foundation for future growth of our organization. The Oregon Chapter supports Portland State University, University of Portland and Oregon State University collegiate chapters, while our community efforts support 10 local non-profits.

### Collegiate

#### Goals

- Increase involvement with PSU, UofP and OSU Chapters.
- Help mentor and support collegiate chapters.
- Encourage more interactivity between the collegiate and professional chapter.
- Engage collegiate chapters in board meetings and special events.

#### Results

- Four professional chapter board members attend collegiate chapter programs as guest speakers.
- PSU Chapter representation at over 75% of professional chapter board meetings.
- Cross promoted two signature events for the PSU Chapter.
- Recruited two collegiate chapter members for the professional chapter board for next year.



## **Community Outreach**

In only its second year, our community outreach program has become a stellar way to help the community, enhance the chapter's profile, and recruit new members.

### **Our Goals:**

- Program growth:
  - Develop a two-year program
  - Collaborate with eight local non-profits
  - Enlist eight Project Managers
  - Recruit 50 volunteers
  - Solicit \$250 of in-kind donations
  - Establish a committee with succession planning
  - Establish standard program structure
  - Identify ongoing resources
  - Create standard documents
  - Cultivate positioning within community and NW region
- Standardize the program structure
- Leverage our expertise to help local non-profits succeed
- Cultivate the local marketing talent pool by providing hands-on experience, mentorship, and networking opportunities
- Help members and prospective members strengthen their relationships with AMA Oregon

### **Our Results:**

- Two participating non-profits initiated their second year of the program
- 10 non-profits chose to participate
- We engaged 10 Project Managers
- 100 volunteers contributed their efforts
- We received \$675 of in-kind donations to the program
- Produced two press releases and posted two edited, online videos

### **Lessons learned**

- Metrics for success are crucial. Participant numbers give a good basis for statistics, but volunteer satisfaction and member recruitment demands more attention. We intend to develop a short survey for volunteers. Tying program involvement numbers to membership would help guide the program's growth.
- Use a monthly feedback form for project managers and non-profit points of contact to ensure each project runs smoothly.
- Adopt additional protocol to manage volunteers effectively. Perhaps from board membership.

See Appendix I: [AMA Oregon Chapter Non-Profit Partners](#)



## Financial Management

### 2008-2009 Financial Goals

- Focus as a board on monitoring costs and minimizing expenses where possible.
- Produce accurate accounting and tracking of revenues and expenses for each committee and event.
- Communicate financial results to board members in a timely manner.
- Evaluate investments and report results to the board on a regular basis.
- Prepare and submit State and Federal tax reports on a timely schedule.

### Results:

- Board expenses alone were reduced by 50% from the prior year.
- Established a Finance Committee to review the investment strategy of the Oregon Chapter and ensure that our investments are in-line with that strategy. The committee met in September 2008 and will meet annually.

### Reserve Funds

The Chapter has \$51,000 in reserves at the end of the fiscal year. Of this, \$13,500 is in a money market account and \$37,500 is invested in two diversified mutual funds. The chapter has maintained % of operating budget our reserve accounts.

### Financial Summary

	Fiscal Year 2008-2009 Budget	Fiscal Year Ended June 30, 2008	Fiscal Year Ended June 30, 2009
Total Beginning Assets	76,748	96,941	76,748
Total Revenues	118,358	101,590	87,524
Total Expenses	116,042	102,042	89,329
Total Assets and Revenues minus Expenses	79,064	96,489	74,943

### Financial Management Officer

Our Chapter has Scott Hall, CPA, serving on the board as Treasurer. Scott has been on the board for three years and oversees the Chapter's finances. Scott reviews the bookkeeper's work and recommends adjustments prior to each monthly board meeting where he presents the financial reports to the board. He also prepares the federal and state tax returns for the organization.

See Appendix I: Chapter Budget, Balance Sheet & Profit and Loss Statement



## Brand Marketing and Communications

### Communications Methods

To communicate with our membership, targets/prospects, and the marketing community at large we used the following method:

- Email programming announcements
- Postcard programming announcements
- Electronic newsletter with the local networking organization PDX Mindshare
- Chapter website
- Press releases
- Newspaper/Business journal advertising
- Twitter
- Facebook Page
- LinkedIn Group for chapter members

### Press Promotions

- Drafted and distributed MAX Awards “Next”: winners release.
- Drafted and distributed “Forward ‘09 Brandologie” announcement.
- Met with *Oregonian’s* Jonathan Brinkman to develop a story on networking, entrepreneurship and AMA Oregon’s role.
- Met with *Portland Business Journal’s* new marketing industry reporter Courtney Sherwood to introduce her to AMA, upcoming events and discuss topical marketing stories in the Portland metro area.

### Testimonial Promotions

Testimonials were not used as part of our primary marketing strategy.

See Appendix I: [Communications Samples](#), [Website Analytics](#), [Centralized Document Management System](#)



### **AMA Website**

Most visitors arrive at the homepage, which provides everything prospects need to learn about the chapter, get involved and become a member. We've found that curious visitors generally want to "engage" with the AMA at events or in social media. Therefore, we have started using RSS and social media (Facebook, LinkedIn, Twitter) to encourage visitors to subscribe and contribute to the chapter's online community. We expect web site traffic to decrease as RSS subscriptions and social media posts increase. As a result, a small, purpose-driven website that complements our social media presence best suits the chapter's needs.

We successfully moved off a Content Management System that had become unreliable. This taught us the value of owning all aspects of our web site by using DreamWeaver to update content and a local ISP (EasyStreet.com) to host.

### **Website Statistics**

We used Google Analytics -a market researcher's dream come- to track our web statistics. The fact that they give it away for free made it irresistible to our chapter's needs. When compared to last year, site visits have increased 13.1% and pageviews 20.3%. Site visitors most often enter through direct referrals (i.e. email communications) and web searches for the local chapter.

### **Centralized Document Management System**

Our chapter uses SharePoint where there's a separate area for each committee to manage documents and communications.

See Appendix I: [Communications Samples](#), [Website Analytics](#), [Centralized Document Management System](#)



## Membership Entry Form

### Membership Numbers

• Professional Members	276
• Students Members	66
• Bridge Members	6
• New Members	159
• Drops	196
• <b>Total Chapter Members</b>	<b>348</b>
• <b>Retention Rate</b>	<b>71%</b>

### Membership Recruitment Strategy

Membership recruitment and retention are the lifeblood of our chapter. We encourage current members to attend our networking, professional development and programming events and to invite their friends and professional acquaintances. We have integrated our recruitment and retention efforts into every aspect of each member's experience with the chapter.

#### Strategic Elements

- Promote membership at monthly luncheons at registration table
- Install greeters at our events, enhancing the 'welcome factor'
- Market spring and fall membership campaigns through e-blasts
- Collect prospect business cards at luncheons
- Board members actively recruit prospects to luncheons
- Ad in Oregon Business Magazine
- Segment event attendance list to follow up with non members
- E-newsletter features focusing on our core services
- Word of Mouth

#### Timing

- Monthly
- Per-event
- Monthly
- Monthly
- Monthly
- One time
- Monthly
- Monthly
- Daily

### Exclusive AMA Oregon Chapter Benefits

In addition to national AMA benefits, we offer a local package to aid recruitment, including:

- The opportunity to become a part of our local member-only LinkedIn group
- \$50 gift certificate from McCormick and Schmicks, a local restaurant, upon joining
- Discount subscription rates to the Portland Business Journal
- Receive a complimentary issue of Oregon Business Magazine
- Incentive conference discount; "Join today and receive a discount on event registration."
- Opportunity to get involved in the highly recognized Community Outreach program
- Parking validation at monthly luncheons



### Membership Drives

During the Fall and Spring Membership drives we aggressively recruited through:

- Board involvement - Board has the opportunity to invite two prospects per year at no cost. We encourage board members to bring prospects during each of the campaigns. (Prospects get heightened exposure as board member guests.)
- Send out monthly E-blasts to subscribers during campaign month
- Promote membership campaigns at the registration table during campaign months.
- Promote membership via president’s announcements at monthly meetings
- Promote cross membership with Willamette Valley AMA chapter located in Eugene.

### Membership Retention

Our efforts to recruit new members would be worthless if we didn’t also work to retain our current membership. Despite our best efforts, the economic climate had a formidable impact on our member-retention goals. Our strategies included:

#### Strategic Elements

	Timing
• Thank you letter and \$50 gift certificate from local restaurant upon renewal	Monthly
• Cooler E-mail program to send reminder email 60 & 30 days prior to expiration	Monthly
• A follow-up phone calls for retention efforts	Monthly
• Developed Buddy Program to connect members immediately and spark engagement	Monthly
• Quarterly e-mail sent to all members requesting volunteer involvement	Quarterly
• “Volunteer of the Month” program	Monthly
• Develop 16-month retention program to continuously check in with members	Monthly
• Invoices mailed locally to members, personalized for renewal	Monthly

### Membership Research

Throughout the year we survey our members for several reasons. We gauge event satisfaction, membership perceived value, industry data and future programming content. We have included this information in the appendix section.

### Goals

Provide actionable, timely data to help measure effectiveness of programs and areas of improvement for board development, membership recruitment and retention as well as event satisfaction and attendance.

### Key Lessons Learned

Fruitful research work often comes in teams. I would highly suggest that any person taking over this research position make sure that she partners with at least one other person. This makes sure that the team always has bandwidth and can even venture out into new research territory.

See Appendix II: Membership Surveys and Results



## Programming Entry

### Programming Strategy

The programming committee busted some serious tail to provide value with a top quality, well-rounded event schedule relevant to members and member prospects, including:

- Monthly Luncheons
- Networking Events (qty 4)
- Professional Development Workshops (qty 4)
- Annual Conference
- Marketing Awards of Excellence (MAX)

### Programming- Monthly Luncheons

Our goal is to position AMA Oregon as the premier marketing resource in the Portland area. There is no other organization in town that approaches the depth and breadth of our programming.

The flagship program for AMA Oregon is our monthly luncheon. Our presenters ranged from the First Lady of Oregon, to the CEOs of NAU and Seaport Airlines, the Marketing Director of Rock Band, President Obama's social media strategist, and even a convicted felon turned successful entrepreneur. Distilling these diverse or mega-budgeted ideas down to a digestible level even for low-budget efforts helps attract and engage the audience.

### Networking Events

Networking events are an opportunity for our members to mingle with other professional organizations in a relaxed setting. Providing such a venue brands the chapter as a valuable resource to all attendees and enhances its reputation within the local marketing community.

### Our Goals

- Expand the chapter's exposure to the professional community
- Orchestrate four top-quality networking events each year
- Expand to become the largest creative networking event in Oregon
- Peak/Average goal: 200/125

### Our Results

- Organized four networking events: Connect Networking Three, Four, Five and one NBA Trailblazers Event
- Hosts loved us: *"Best attended event ever", "Largest group ticket sales for the Blazers in 2009.", "The largest group we had ever had and we were very happy with the turn out."*



### **Our Numbers**

- Minimum 150 attendance at each event. Far more than any other networking event in the area.
- Charged \$5-10 per person per event to generate revenue.
- Involve eight local creative organizations: (Portland Advertising Federation, Public Relations Society of America, American Institute of Graphic Arts, Self-Employed Creative Professionals, Oregon Entrepreneurs Network, American Society of Media Photographers, Software Association of Oregon, International Association of Business Communicators)

### **Lessons Learned**

- Partner with other creative organizations for some professional cross-pollination. Extending the invitation beyond chapter membership helps expose prospective members to the AMA.
- Due to the initial popularity of the event, we are now charging an entrance fee to cover our costs and generate a small revenue stream. This has not affected attendance; heck, it probably helped separate the curious from the committed.
- Next year we will sell tickets directly to our members and generate income by adding a processing fee. The success of this year's NBA networking event relied on offering our members tickets to a sold-out game. Attendees got a private area in which to network before the game. The hosting team, the Portland Trailblazers, multiplied the value of the event by providing a speaker from their marketing department.

### **Programming- Professional Development Workshops**

Professional development workshops provide solid "how-to" tactical instruction. They also allow the chapter to strengthen its position as the premiere professional resource for the local marketing community.

### **Our Goals:**

- Mix traditional marketing programming with "new media" strategies. These strategies were identified as popular topics in last year's chapter survey.
- Provide actionable "take-aways" participants could readily use in their organizations and professions.

### **Our Process:**

To drive interest and attendance in the PD series while accommodating major holidays, the PD team offered a pair of workshops in September and October. The second pair of workshops were evenly spaced in January and April, 2009.

### **Lessons Learned:**

- Promote Professional Development events further in advance (at least one month)
- Clearly identify "take aways" for each session in event communications
- Invite additional collegiate chapters to participate in Professional Development events
- Provide additional follow-up methods after each event (website link for resources, additional "thank you" e-mail alerting participants to the upcoming survey on the event)



### **Programming- Annual Conference**

To round out our program schedule and extend professional development and networking opportunities we organized an annual conference.

#### **Our Goals:**

- Increase attendance to 250
- Add value by
  - expanding programming,
  - improving food and beverage,
  - enhancing networking opportunities,
  - diversifying the audience with partner organizations, and
  - adding innovative technologies.
- Create a replicable program by adding tried and tested processes and creating a blueprint for the next event coordinator.

#### **Our Results:**

- 195 attendees (compared to last year's 132).

#### **Content:**

- Four keynote speakers, four breakout presenters and two tracks of programming.
- Speaker reach was extended to include marketing luminaries from across the country
- To increase event buzz, conference speakers were interviewed and Q&A was embedded into the pre-event emails and blog.

#### **Communications:**

- Initiated event communications four months ahead of time.
- Create a conference-specific website, a chapter first: [www.forwardama.com](http://www.forwardama.com)
- Integrated social networking into the communications strategy:
  - Facebook
  - LinkedIn
  - Twitter
  - Blog: [www.brandologie.com](http://www.brandologie.com)
- Puget Sound AMA allowed AMA Oregon to market the event to their membership list, attracting a new, complementary audience.
- Produced a video highlighting the 2009 event, to serve as a sales and communications tool for future editions of the conference.

#### **Logistics:**

Implementation of interactive mobile event applications, including: mEvent, Twitter (with on-site live RSS feed display), Mobile tagging, and Poll Everywhere (collecting real-time audience response via mobile phone during programming.)

**Sponsorships:**

- \$8,750 of cash sponsorships and \$60,000 of in-kind sponsorship.

**Sustainable Model:**

- Planned a volunteer model:
  - Job descriptions and organizational chart for conference team
  - Advisory Board description and participation requirements
- Document library for future use:
  - Speaker contracts
  - Sponsorship packages and contracts
  - Social networks with an established subscriber base of this year's attendees.
  - Partner organization relationships and contacts

**Lessons Learned:**

The economy is a strong dictator of attendance; most attendees are company-sponsored. The high unemployment rate in the creative sector and cuts to professional development budgets in the corporate realm strongly and adversely affected attendance.

In order for the event to break even, we must keep costs low and obtain cash sponsorships. In 2009 we kept costs at a minimum by leveraging the advisory board's professional connections to obtain speakers without fees, and by enacting a "cash-only" sponsorship model for all sponsors with the exception of our conference creative sponsor.

See Appendix III: Sample of conference materials



### **Programming- Marketing Awards of Excellence (MAX)**

What year of programming would be complete without the glitz and glamour of an awards ceremony? Not to mention offering members the chance to rally around their work.

#### **Our Goals:**

- Maintain MAX's position as *the* marketing event of the year in the Portland Metro area.
- Receive 40 show entries; 30% more than last year.
- Host 193 paid attendees; 15% more than last year.
- Solicit \$2,000 in cash sponsorships.
- Increase table sponsors by 50% to 12.
- Secure in-kind sponsorships for printing, awards, audio-visual presentation, and creative.
- End the year with MAX as a cash-flow neutral event.

#### **Our Results:**

In the Portland area for 2009, MAX was the premier marketing event. No other event approached our attendance, our breadth of content, our satisfaction levels nor our panache.

#### **Our Numbers:**

- 31 award entries received
- Hosted 107 paying attendees
- One cash sponsor, Filter, for a total of \$1000
- Our in-kind sponsors covered our costs for printing, awards, audio visual and creative
- We had a net loss for MAX for the year of \$1,800

#### **Our Lessons:**

- The event is not organized or executed with the intention of generating income. Rather, it's an excellent way to generate credibility for the chapter and drive member recruitment
- Entries drive attendance. Next year we expect to boost attendance by attracting more entries.
- We may also increase attendance by decreasing the cost of the event. The economic downturn may have caused regularly attending companies to cut back on their ticket purchases.
- Introduce new entry categories: judge social media and email campaigns as two separate categories.
- Request entries earlier. An early January entry deadline competes with other new-year mayhem: initiating projects, dieting resolutions and residual hangovers.
- Keep the event's date in February so that it doesn't conflict with the June Conference.



- Instead of charging a premium for tables (with accompanying recognition and signage at the event), it may be better to discount tables to encourage better attendance. Establish this option as a great way for businesses to treat their clients or co-workers.

**Our Planning:**

We promoted the luncheon events at least two months in advance. We didn't want to crowd out upcoming events by announcing other events planned later on. The co-sponsored events were promoted three to four months in advance in collaboration with our partners.



### CEA Completion

Chapter Representative signature to indicate that this CEA entry is complete.

Signature:

A handwritten signature in black ink, appearing to read "Chylon Pappas", written over a light gray diamond-shaped background.

PrintedName: Chylon Pappas  
Board Position: 2008-2009 AMA Oregon Chapter President  
Date: 8/17/09