



January 2025

In preparation for the Regional Summit, participants were asked to familiarize themselves with four focus areas identified as high potential to partner for impact, they are: Education, Technology, Annual Conferences, and Shared Services.

*Term definitions* for each area of focus were provided as follows:

### Education

*Education, aka Professional Development, Training*

Definition: process of continuing education and career training that helps people gain new skills and improve their professional knowledge, competence, and effectiveness; it is a variety of activities that help people improve that can include:

In-person sessions (stand-alone or at conferences)

Webinars (free, paid, and/or sponsored)

Online Learning (asynchronous or in a cohort)

Maybe attached to Continuing Education Units

Podcasts

### Technology

Definition: ranges of tools, equipment, processes, platforms and applications all aimed at streamlining operations, facilitating member interaction, and delivering valuable content and services. An initial, non-exhaustive listing of key types of technologies we may consider:

Membership Management Systems (AMS): central hub for managing member data, registration, dues collection, and access to member-only content

Online Forums and Communities: platforms for members to discuss topics, share knowledge, and network with each other

Event Management Platforms (e.g. conference apps): tools for registering attendees, managing event schedules, and facilitating online event registration

Webinars and Live Streaming: digital platforms for delivering presentations, workshops, and conferences virtually

Content Management Systems (CMS): platforms to manage and update website content easily

Learning Management Systems (LMS): to host online courses, training modules, and continuing education programs

Data Analytics Tools: to gather and analyze member data to identify trends and inform strategic decisions

Email Marketing Tools & Social Media Platforms

### Annual Conferences

Definition: gathering of association members to learn about association activities, discuss critical issues, gain insights on current topics, access opportunities to develop skills, knowledge, and continuing education units and, of increasing value, to connect and build community. Content is often focused on practical issues related to the work of participants, as well as regulations, funding and other factors affecting the profession. Formats include a published agenda, registration, and scheduled speakers, inclusive of keynotes, and discussion panels.

For our definition, annual conferences are held at the international level by ACUHO-I, at the regional and sometimes state level; other configurations include religious affiliations, peer group, and athletic conferences.

Professional conferences differ from academic conferences in that they have broader goals and usually have a much broader attendance. Suggested annual conference components for consideration:

Logistics: venue selection and contract; food & beverage; A/V; decorators

Programming: keynotes; sessions after-hours

Marketing: to increase attendees and volunteers; to secure in industry partnerships; exhibit booths; sponsorships; other

### Shared Services

Definition: business models that consolidate and centralize support functions into a single unit to better serve the organizations. Shared services units, also known as a shared services center (SSC) or shared services organization (SSO), provides standardized services to multiple organizations with similar types of operations.

Such services help achieve efficiency and cost savings while providing consistency through time and change in volunteers; shared services can include a variety of functions, such as human resources, research, finance, information technology, supply chain, marketing, facilities, and procurement.

Example: financial shared services offer separate and confidential financial activities used by different associations; monthly and quarterly reporting is provided. The SSC does not make decisions about how money is spent or who has authorization to spend the money; it reconciles accounts, pays bills (with approval), and other financial functions as determined by a written agreement.

Best practices: SSCs should be competitive with outside vendors and should meet specific service needs; SSCs should continuously seek ways to improve processes and services and, as such, should enable associations to focus on volunteers, members, content, and other aspects that drive value.