



FORGING GREATER COLLABORATION
BETWEEN VENDORS AND CONSULTANTS

Alexandria, VA

April 29, 2025

Our Facilitators



OLIVIA WILKINS

Business Analyst / Project Manager, PerByte

Olivia joined PerByte after working at two associations where she facilitated end user training, delivered business and process analysis, and provided data management during their Aptify implementations. Before joining the world of associations, Olivia taught a variety of grade-school subjects and undergraduate coursework where she honed her craft evaluating how people learn and engage with systems, processes, and environments. She combines two decades of experience in education, change management, and analytics to improve user adoption and foster strong relationships between technical and non-technical stakeholders.



THOMAS MARQUIS

Nonprofit Governance & Impact Consultant, 501Works

Thomas has worked for two decades in numerous roles for a nonprofit movement in the US, within the context of an internationally federated NGO structure, focused on creating places of belonging and inclusion for adults with intellectual disabilities. For six years he was a senior leader guiding local chapters through inclusive and participatory visioning processes as well as supporting boards to understand and improve organizational health. He is currently the Director of Evaluation and Impact, studying and amplifying the societal impact of the national movement while maintaining unity among a culturally diverse Federation with members of all abilities, ages, and beliefs.

Agenda

- | | |
|---------|---|
| 9:00am | <ul style="list-style-type: none">• Welcome, Introductions, & Overview• Main Topic: The elephant in the room and what we can do...• Progressive Discussion: Individual / Pairs / Quads |
| 10:15am | <ul style="list-style-type: none">• Break |
| 10:30am | <ul style="list-style-type: none">• Small Group |
| 11:00am | <ul style="list-style-type: none">• Report Back / Prioritization of potential conversations• Ven-Con Planning Committee Update |
| 12:00pm | <ul style="list-style-type: none">• Lunch |
| 1:00pm | <ul style="list-style-type: none">• Welcome Association Attendees• Vendors/Consultants: Deeper Dive Association: small group• Break |
| 3:00pm | <ul style="list-style-type: none">• All present ideas / questions to one another – Discuss |
| 4:15pm | <ul style="list-style-type: none">• League of Association Technologists Announcement• Evaluation & Wrap-up |
| 5:00pm | <ul style="list-style-type: none">• Happy Hour @ San Antonio Bar & Grill |

Ground Rules...Antitrust

- **No attendee shall engage in antitrust behavior, such conduct includes:**
 - Agreements or implicit understandings reached as to pricing, even as to price “floors” or price “ranges” and not specific, individual prices.
 - A participant’s present and future prices, pricing policies, terms or conditions of sale including credit terms, discounts, or upcoming bids;
 - A participant’s cost of operations, profit margins or mark-ups;
 - A participant’s specific marketing strategies, capacity, production quotas, output decisions, purchasing information and strategies, sales revenue and volume, or research and development plans;
 - Agreements not to compete;
 - Boycotts or blacklisting; and
 - Allocation of customers or sales areas.

Ground Rules...For Conversations

- All experiences in the room are **valid** and **welcome**
- Speak from **your experience** not from others
- All voices in the room are **invited** to contribute –
(lean back vs. lean in)
- Have an open mind and be **curious** –
(not a typical engagement for our day to day, get what you give)
- A **report** out will be created – no individual attribution without written consent

Ground Rules...Common Vocabulary

- **Our Industry** – the association technology space
- **Association's technology project** – a major platform implementation for an association of any size (e.g. CRM, AMS, LMS, finance, website)
- **The Journey** - an association's technology life cycle: preparation, selection, discovery & design, implementation, launch, post implementation support & growth
- **Vendor** – organization that publishes software intended to serve an association's technology needs
- **Consultant** – an independent organization providing professional services to association clients

On small groups...

“The small group is the unit of transformation.

It is in the structure of how small groups gather that an alternative future will be created.

This also means that we must set aside our concern for scale and our concern for speed.

Scale, speed, and practicality are always coded arguments for keeping the existing system in place.”

-Peter Block, *The Structure of Belonging*

Morning Small Group...

- **1 – 2 – 4 – 8 Method** for group consensus
- **90 minutes total**
 - 15 minutes – **individual reflection** on all 3 prompts
 - 15 minutes sharing in **pairs**
 - Each person shares what surfaced for them, pair looks for commonalities and intersections to advance
 - 15 minutes broadening to **quads**
 - Each pair brings forward what advanced for all three prompts to the conversation in a quad – again chooses responses to advance
 - 15 minute break
 - 30 minutes synthesizing in a **group of 8**
 - Quads come together, share major insights from previous conversations on all three prompts
 - Group of 8 chooses 2 statements for each prompt that will be presented to the plenary

Morning Small Group...

- When the **Group of 8** comes together:
 - You are agreeing on 2 key insights / ideas / responses for each prompt to bring forward as **statements** to the entire group. Each group will have 5 minutes to present.
 - Choose a **scribe** (this person will write out the prioritized responses the group agrees on to present to the plenary)
 - Choose a **presenter** (this person will present the responses to the entire group in the next session)

Small Group Prompts

- What thought leadership does the Association Technology space need today?
- How could vendors and consultants collaborate to promote stability for our industry?
- How could partnership between vendors and consultants better support associations to fully leverage their existing technology investments?

Morning Report out...

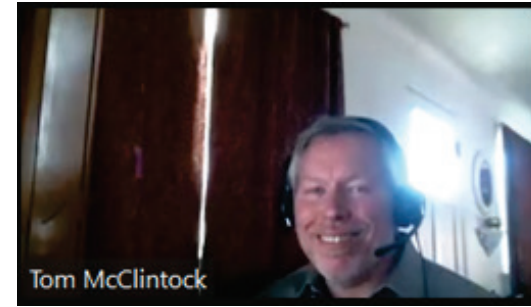
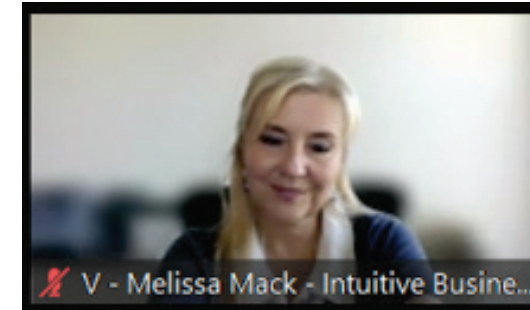
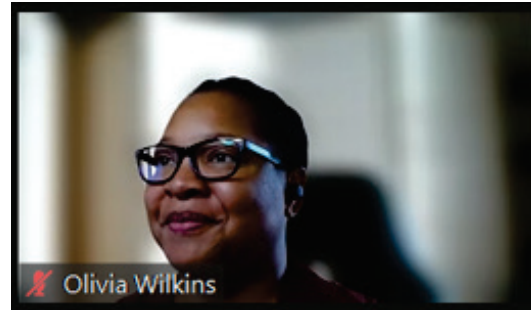
- Each group shares their statements (5 minutes each)
- Clarifying questions / comments / noticings
- Every participant gets 3 votes to place on any of the responses
 - The top 3 responses will be the topics discussed after lunch—with the objective of surfacing ideas on **how** the topic area could be improved and what questions we could ask association attendees

Welcome Association Attendees!

- Introductions
- Recap of morning
- Plan for the afternoon

- 1:00pm
 - **Welcome Association Attendees**
 - **Vendors/Consultants: deeper dive**
 - **Association: small group progressive conversation**
- 2:45pm
 - **Break**
- 3:00pm
 - **All present ideas / questions to one another – Discuss**
- 4:15pm
 - **Announcements**
 - **Evaluation & Wrap-up**
- 5:00pm
 - **Happy Hour**

Ven-Con Planning Committee Update



Not shown: Chris Laskey, Joe Plasterer, and Donna Teabo

Planning Committee Update, April 2025

Fall 2023: AMS Alley launched during AMS Fest. Those activities evolved to Ven-Con, organized/sponsored/underwritten by 501Works and PerByte.

April 2024: First in-person Ven-Con (here) in Alexandria.

June 2024: Second in-person Ven-Con (at Adage Tech) in Chicago.

August-October 2024: Stakeholders initiated action on clear messages received from participants, which included moving Ven-Con into a “neutral” zone, an entity not “under” another vendor or consultant.

- Planning Committee recruited (in person/501Works website/networking).
- Task One: Layout the process for the establishment of a formal Advisory Council
- Task Two: Guide the activities of Ven-Con through first half of 2025

Planning Committee Update, 2

October-December 2024:

- Working sessions developed timelines and plans, and produced results.
 - Plan the November 2024 and early 2025 meetings
 - Begin Advisory Council framework to transition to a more formal governance model, ideally starting Summer 2025

January-March 2025:

- Biweekly planning sessions increase the output, including evaluating many venues and formats for future Ven-Con events
 - *Please respond to the post-event evaluation so we hear your voice*
- Ven-Con exists to level the association tech playing field and help associations enjoy their best tech experience possible

Continues

Planning Committee Update, 3

January-March 2025, continued:

- Decision made to focus on infrastructure before publishing sought-after documents; defer adoption to include more voices in April
- Those draft documents include:
 - Code of Conduct
 - API Bill of Rights
 - Advisory Council framework
- James, give us a quick rundown on the API Bill of Rights
- More info to follow later today on the Tech League!

Planning Committee Update, 4

April 2025:

- Work is well underway on **Know Before You Go**, 90-minute planning webinar **May 20**; will be recorded and available afterward. Offered at no charge
 - Dives into what first-timers at AMSFest should know to get the most out of the product demos in June (Chicago) and November (DC)
 - Shares success-building non-product guidance on the partnership of vendors-consultants-associations including everyone's role in managing change, project management, data migration, data ownership, integrations, training and staff adoption, and more if we have time!
- QUESTIONS?

Deeper Dive Consultants & Vendors

- Looking at our top three priority statements from this morning...let's explore!

Lenses:

- What questions do you have for your peers in the room?
- What questions do you have for the association attendees?

The League

- Why?
 - Technology impacts every association at multiple levels
 - Trying to stand up Ven-Con over past two years has reinforced the need for a space for technologists to work together regularly
- How?
 - Found an organization with equitable composition between vendors, consultants, and association technologists—focused on advancing technology standards through best practice development, education, and thought leadership
- Why now?
 - Existing infrastructure doesn't spend ample time focusing on technology (Technology only a small sliver of the CAE)
 - Rapidly shifting technological landscape (AI)

Coming Soon...



LEAGUE OF
**ASSOCIATION
TECHNOLOGISTS**

Happy Hour Instructions

- Don't stay parked in this building's garage!
- San Antonio Bar and Grill:
200 Hoffman St., Alexandria, VA 22314



Evaluation

<https://www.surveymonkey.com/r/April2025Ven-ConEvaluation>

