



# Prospective Student Toolkit

for  
Associations

Institute for Organization  
Management



U.S. CHAMBER OF COMMERCE FOUNDATION

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## **GENERAL OVERVIEW AND FAQs**

### **WHAT IS INSTITUTE?**

Institute for Organization Management (Institute) is the premier continuing education experience for association professionals. Since 1921, the Institute program has educated and empowered association executives with the knowledge and skills they need to be leaders in their organizations and industries.

The Institute curriculum is comprised of four week-long sessions. Each session is five days and is offered at five locations across the country annually. With courses on topics such as advocacy, media training, membership, finance, legal issues, human resources, and much more, Institute ultimately educates participants on all facets of running an association. To view a full listing of course offerings, [click here](#).

### **WHAT IS THE BENEFIT OF ATTENDING INSTITUTE?**

Association professionals who attend Institute receive an increased capacity to better lead their associations and influence their industries. After participating in four Institute sessions, attendees earn the IOM recognition, which signifies 96 hours of nonprofit management training.

Institute's curriculum is directly tied to the body of knowledge for the CAE (Certified Association Executive) exam. Furthermore, Institute is an approved CAE provider, which means that all courses can be applied to the credit hours needed to sit for the exam. Association professionals who graduate from the program receive 96 credit hours toward the CAE certification.

### **HOW LONG DOES IT TAKE TO GRADUATE FROM THE INSTITUTE PROGRAM?**

Typically, participants attend Institute once a year for four years. However, association professionals looking to fast-track their growth may attend multiple sites in a year. It's up to the participants to decide what pace is best for them and their organizations. For a general schedule of the week, [click here](#). To view upcoming Institute sessions, [click here](#).

## WHO ATTENDS INSTITUTE?

Association, chamber of commerce, and other nonprofit professionals all attend Institute. Class members represent a mix of nonprofit professionals in an effort to enhance networking and learning opportunities.

## WHO TEACHES AT INSTITUTE?

Institute faculty are comprised of industry experts, leading practitioners in the association and chamber industries, consultants, and university professors. [Click here](#) to view a listing of this year's Institute faculty.



## REASONS TO ATTEND

### WHAT'S IN IT FOR YOU?

You will benefit from attending Institute in the following ways:

- You will receive instruction from and engage in discussion with leading industry experts who understand how to help you be successful in your career.
- You will develop a network of peers throughout the country you can turn to for advice and guidance in your pursuit for excellence.
- You will earn 96 credit hours toward your CAE.
- You will become a more valuable employee as a result of the knowledge and skill set gained.
- You will graduate with the IOM recognition, demonstrating to the association community your commitment to and understanding of how to lead an association.

“An invaluable gift my Institute experience gave me was connecting me to a great group of association and chamber professionals that became my own personal sounding board, innovation incubator, and career support. It was like having my own personal think tank focused on helping me succeed.” - **DJ Johnson, IOM, CAE, Vice President, Membership, American Society of Interior Designers (DC)**

### WHAT'S IN IT FOR YOUR BOSS?

Your boss will benefit from sending staff to Institute in the following ways:

- Staff members will learn best practices in the association community to help increase membership, generate non-dues revenue, cut expenses, create more value for members, and improve existing programs.
- Staff members will gain a greater knowledge of association governance and finances, thus helping to ensure the association is legally protected.
- Staff members will be mentored by industry experts.
- Staff members can earn 96 credit hours toward their CAE.

“The information I received in the financial courses last year allowed me to redesign an existing program which brought in the same amount of revenue, but we were able to reduce our UBIT (unrelated business income tax) significantly. We saved enough to more than cover the cost of attending Institute all four years. Now that's what I call ROI!” - **Michelle Donohue, IOM, CAE, Accounting and Operations Manager, California Hotel and Lodging Association**



## WHAT'S IN IT FOR YOUR BOARD?

Board members will benefit from sending association staff to Institute in the following ways:

- Association staff will gain a better understanding of association governance and finances, thus helping to ensure the association is legally protected.
- Association staff will learn about non-dues revenue programs that will aid in increasing the association's revenue.
- Association staff will learn how to increase membership recruitment and retention.
- Association staff will learn how to better lead and manage their teams.
- Association staff will learn how to effectively advocate for policies on city, state, and federal levels on behalf of the association's members.

“Having employees who can look at issues with a 360 degree perspective is both beneficial to your board and critical to the success of your organization. IOM allows for exactly that type of growth and learning in a way that provides immediate impact.” - **Tracey Halliday, IOM, Vice President, Communications, American Beverage Association (DC)**

## WHAT'S IN IT FOR YOUR MEMBERS?

Your members will benefit from association staff attending Institute in the following ways:

- Association staff will be kept abreast of industry trends and how to effectively translate those trends into success for the members.
- Association staff will learn how to effectively advocate for policies on city, state, and federal levels on behalf of the association's members.
- Association staff will gain a better understanding of how to increase the return on investment members receive from paying dues.
- Association staff will learn how to more effectively develop value-based meetings.
- Association staff will learn of programs that have benefited members of other associations throughout the country and will be able to adopt those practices to meet the association's needs.

“Attending Institute each summer always meant that I came home energized and with a list of new concepts and new ways of thinking. I was able to “borrow” some great ideas from my classmates that I was then able to build into my programming to make it a richer experience for our membership.” - **Teresa L. Eyet, IOM, Senior Director, Conference Programming and Education Development, American Health Care Association (DC)**

## CURRICULUM

Institute’s curriculum is aligned with the knowledge requirements for the CAE and CCE nonprofit industry certifications. Each year attendees take six core courses and select three electives courses, one from each group. Electives allow participants to further their professional development by focusing on particular areas of interest. Upon graduation a student will have earned a total of 96 credit hours.

### **First-Year Core Courses**

- C110 Financial Fitness
- C125 Hiring, Firing, and Everything In Between
- C130 Unleash the Leader Within
- C150 Communicating with Confidence
- C180 Guide to Governance
- C185 Recruit, Engage, and Retain Your Members

### **Third-Year Core Courses**

- C310 Budgeting and the Bottom Line
- C330 Everyday Ethics
- C340 Strategic Planning
- C341 Win-Win Partnerships
- C360 Innovate or Die
- C380 Volunteer Development

### **Group One Elective Courses**

- E110 Revving Your Revenue Stream
- E120 Executive Law
- E126 Dealing with Challenging Employees
- E140 Building Organizational Excellence
- E142 Fundamentals of Community and Economic Development
- E161 Business Communication Technology Trends
- E163 Communicating Through the Media
- E180 Building Better Boards and Committees

### **Group Three Elective Courses**

- E310 Dues and Don’ts
- E330 Learning to Let Go
- E331 CEO Lessons Learned
- E342 Advanced Strategies of Community and Economic Development
- E350 The Art of Persuasion and Negotiation
- E360 Strategic Communications
- E362 Policy Development and Implementation
- E380 Delivering Value

### **Second-Year Core Courses**

- C220 Is That Legal?
- C230 Managers Who Motivate
- C250 Customer Service Inside and Out
- C260 Marketing Strategies
- C261 Events: Strategy and Operations
- C270 Effective Government Affairs Programs

### **Fourth-Year Core Courses**

- C420 Current Legal Issues Facing Your Org.
- C430 Becoming a Strategic Leader
- C441 Industry Forecast
- C460 Integrating Strategic Technology Solutions
- C470 Advocacy and Alliances
- C490 Organization Leadership for the Future

### **Group Two Elective Courses**

- E210 Executive Finance
- E211 Sponsorship Solicitation
- E230 Managing Upward
- E240 Strong Associations for the Future
- E241 Strong Chambers for the Future
- E243 Developing a Competitive Workforce
- E244 Using Data to Grow and Sustain Your Org.
- E250 PACs and Political Endorsements

## DATES AND DEADLINES

### **Midwest Institute**

University of Wisconsin  
Madison, WI  
June 4-8, 2017

Scholarship Deadline: March 24, 2017  
Early Enrollment Deadline: April 21, 2017

### **Southeast Institute**

University of Georgia  
Athens, GA  
June 25-29, 2017

Scholarship Deadline: March 24, 2017  
Early Enrollment Deadline: April 21, 2017

### **West Institute**

Loyola Marymount University  
Los Angeles, CA  
July 9-13, 2017

Scholarship Deadline: April 28, 2017  
Early Enrollment Deadline: May 26, 2017

### **Northeast Institute**

Villanova University  
Villanova, PA  
July 30-Aug. 3, 2017

Scholarship Deadline: April 28, 2017  
Early Enrollment Deadline: May 26, 2017

### **Winter Institute**

University of Arizona  
Tucson, AZ  
January 3-7, 2018

Scholarship Deadline: October 20, 2017  
Early Enrollment Deadline: November 17, 2017







## COST

The cost to attend Institute is \$1,295.00 for U.S. Chamber members and \$1,745.00 for nonmembers. Tuition increases by \$200.00 after the early enrollment deadline.

The enrollment fee includes tuition, materials, scheduled meals, breaks, and receptions. Attendees are responsible for transportation to and from site, housing, non-program meals, and incidental expenses.

Below is a breakdown of what is included in the enrollment fee.

### **WHAT'S INCLUDED**

- Nine classes with experienced and knowledgeable faculty members
- 24 continuing education hours toward the CAE (96 total)
- Opening networking reception
- Four breakfasts (West and Northeast only)
- Four morning snack breaks
- Three lunches
- Three afternoon snack breaks
- Graduation and Big Bash celebration reception and dinner
- Transportation between campus and host hotel(s) when not within walking distance

### **ADDITIONAL COSTS**

- Travel to and from site
- Lodging
- Two dinners (class dinner and free night)
- Additional activities
- Incidentals