



WINTER

U.S. CHAMBER OF COMMERCE FOUNDATION
Institute for Organization Management

2014 BOARD OF REGENTS ROSTER

CHAIR

Kimberly Nastasi, IOM
Chief Executive Officer
Mississippi Gulf Coast Chamber of
Commerce
11975E Seaway Road
Gulfport, MS 39503
228-604-0014
ceo@mscoastchamber.com
Term: 2007-2015

PAST CHAIR

Rich Cantillon, IOM
President and CEO
Ponca City Area Chamber of Commerce
PO Box 1109
Ponca City, OK 74602
580-765-4400
rich@poncacitychamber.com
Term: 2009-2015

Kasey Cronquist, IOM

CEO/Ambassador
California Cut Flower Commission
PO Box 90225
Santa Barbara, CA 93190
805-696-5000
kcronquist@ccfc.org
Term: 2009-2015

Nick Kieffer, IOM, CP

Vice President
Goshen Chamber of Commerce
232 South Main Street
Goshen, IN 46526
574-533-2102
nkieffer@goshen.org
Term: 2012-2016

VICE CHAIR

Jack Lank, IOM
President and CEO
The United Regional Chamber of
Commerce
42 Union Street
Attleboro, MA 02703
508-222-0801
jack@unitedregionalchamber.org
Term: 2010-2016

Blain Andera, IOM

Executive Director
Spirit Lake Chamber of Commerce
PO Box 155
Spirit Lake, IA 51360
712-336-4978
chamber@spiritleakecc.com
Term: 2011-2015

Rick Howe, IOM

Director of Visitor Services
Jackson Hole Chamber of Commerce
PO Box 550
Jackson, WY 83001
307-201-2294
rick@jacksonholechamber.com
Term: 2014-2016

Lisa Krueger, IOM, ACE

President and CEO
Lake Havasu Area Chamber of Commerce
314 London Bridge Road
Lake Havasu City, AZ 86403
928-855-4115
lisak@havasuchamber.com
Term: 2010-2016



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2014 BOARD OF REGENTS ROSTER

William Lee, IOM

Chief Executive Officer
Tourism Association of New Mexico
6121 Indian School Road, NE
Albuquerque, NM 87110
505-345-5553
bill@tanm.org
Term: 2014-2016

Ruth Littlefield, IOM, CCE

Senior Vice President, Membership
Development and Relations
Tulsa Regional Chamber
One West Third Street, Suite 100
Tulsa, OK 74103
918-560-0280
ruthlittlefield@tulsachamber.com
Term: 2012-2016

Robert Medler, IOM, MOL

Vice President, Government Affairs
Tucson Metropolitan Chamber of Commerce
PO Box 991
Tucson, AZ 85701
520-792-2250
rmedler@tucsonchamber.org
Term: 2014-2016

Tracy Mosley, IOM

President and CEO
Choctaw Chamber of Chamber
PO Box 1000
Choctaw, OK 73020
405-390-3303
tmosleychoctawchamber@tds.net
Term: 2014-2016

Stephanie M. Parton, IOM, CAE

Senior Manager, Member Communications
Indiana CPA Society
8250 Woodfield Crossing Boulevard #100
Indianapolis, IN 46240
317-726-5026
sparton@incpas.org
Term: 2012-2016

Ed Stolmaker, IOM

President and CEO
Marana Chamber of Commerce
13881 North Casa Grande Highway
Marana, AZ 85653
520-682-4314
edstolmaker@maranachamber.com
Term: 2012-2016



AGENDA

OCTOBER 10, 2014

1:00 P.M. - 3:00 P.M. EDT

U.S. CHAMBER OF COMMERCE
WASHINGTON, DC

- | | | |
|-------------|---|---|
| I. | Welcome and Introductions | Kimberly Nastasi, IOM |
| II. | Approval of Minutes | Kimberly Nastasi, IOM |
| III. | 2015 Winter Institute | Kimberly Nastasi, IOM/Board Members/Institute Staff |
| | A. Review of Strategic Goals | |
| | • Reach a stretch goal of 220 overall attendees. | |
| | • Each regent commits to sending and/or recruiting at least one first-year attendee. | |
| | • Raise \$10,000 for the scholarship fund. | |
| | • In addition to reaching out to attendees on the “attended in 2014, not yet registered for 2015” contact list, connect with current attendees in other ways. | |
| | B. Approval of Class Advisors | |
| | C. Review of the Week/Regent Responsibilities | |
| | D. Morning Session Recap and Additional Business | |
| IV. | Institute Staff Update | Institute Staff |
| | A. Program Updates | |
| V. | Other Business/Adjournment | Kimberly Nastasi, IOM |



WINTER

U.S. CHAMBER OF COMMERCE FOUNDATION
Institute for Organization Management

BOARD OF REGENTS MINUTES

AUGUST 14, 2014
2:00 P.M. EDT
CONFERENCE CALL

In attendance: Kimberly Nastasi, IOM; Jack Lank, IOM; Blain Andera, IOM; Nick Kieffer, IOM, CP; Lisa Krueger, IOM, ACE; William Lee, IOM; Ruth Littlefield, IOM, CCE; Robert Medler, IOM, MOL; Tracy Mosley, IOM; Stephanie M. Parton, IOM, CAE; Robert J. Foulks, IOM, CAE, CPA, CGMA; Karyn K. MacRae, IOM, CAE, CMP; Shelby A. Parish, IOM, CMP; Andrew Weller; Carly Turk

I. Welcome and Introductions

Kimberly Nastasi, IOM welcomed everyone to the call and introductions were made.

II. Approval of Minutes

The minutes from the February 24, 2014 meeting were approved with no changes.

III. Review of Strategic Goals

- At the time of the call it was reported that 22 people had registered thus far, 2 of which were first-year attendees.
- Regents reported on the successes of various recruitment and marketing efforts that have taken place. Volunteers have been able to promote at state conferences, both in large group and smaller one-on-one settings.
- Kimberly Nastasi reminded everyone to please reach out and connect with those people they were assigned to on the call list. In addition to providing reminders about hotels and attendance, it was reiterated that there is always opportunity for new first-years when turnover has taken place.
- Stephanie Parton informed the group that she has been soliciting online donation requests for silent auction items and that the items will most likely be on display for bidding throughout the Institute week.

IV. Winter Institute 2015

- Regents were encouraged to continue to utilize social media when promoting the program.
- Class Advisors are in the process of being selected and should be confirmed by early September.
- The Memorial Union Ballroom has been reserved for the Institute Kickoff, which will have a football theme.
- Robert Medler reported that he and Ed Stolmaker are working with the JW Marriott Starr Pass as an alternate location for graduation and the Big Bash. Regents were advised that it is a beautiful property with spectacular views and that the quality of food is better than that of the Marriott University Park. Transportation is currently being looked into.



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BOARD OF REGENTS MINUTES

AUGUST 14, 2014
2:00 P.M. EDT
CONFERENCE CALL

V. Other Business/Adjournment

Board of Trustees Chair Bob Foulks reported on a successful summer and reiterated that although the first-year goals were not reached, retention across the board was very high. Bob also complimented Kimberly on the success of her weekly emails.

There being no other business the call was adjourned.



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2015 SCHEDULE OF ACTIVITIES **PLEASE NOTE THIS SCHEDULE IS TENTATIVE**

Sunday, January 4th

11:00 a.m.–11:30 a.m.
11:30 a.m.–12:15 p.m.
12:15 p.m.–12:45 p.m.
12:45 p.m.–1:00 p.m.
2:00 p.m.–5:00 p.m.
3:30 p.m.–4:00 p.m.
4:00 p.m.–4:30 p.m.
4:30 p.m.–5:00 p.m.
4:30 p.m.–5:00 p.m.
5:00 p.m.–5:45 p.m.
6:00 p.m.–8:30 p.m.

Board of Regents Meeting: Marriott Hotel
Board & Class Advisor Briefing: Marriott Hotel
Board & Class Advisor Lunch: Marriott Hotel
Board & Class Advisor Additional Business: Marriott Hotel
Registration: Marriott Hotel, Lobby Level
Bonus Session: Enhance Your IOM Experience Through Technology, Marriott
First-Year Pre-Homeroom: Marriott Hotel
Graduation Rehearsal (4th years only): McClelland Hall
Campus Tour: Marriott Hotel, Lobby
Homeroom: Individual Classrooms, McClelland Hall
Institute Kickoff: Memorial Hall Student Union South Ballroom

Monday, January 5th

7:30 a.m.–8:00 a.m.
7:30 a.m.–8:00 a.m.
8:00 a.m.–11:30 a.m.
11:30 a.m.–12:45 p.m.
12:45 p.m.–4:15 p.m.
1:30 p.m.–2:00 p.m.
7:00 p.m.

Campus Tour: Lobby, Marriott Hotel
Registration: Institute Office, McClelland Hall Room 102
Core Classes: Individual Classrooms, McClelland Hall (*Break: 9:30–10:00 a.m.*)
Lunch: Memorial Hall Student Union North Ballroom
Core Classes: Individual Classrooms, McClelland Hall (*Break: 2:15–2:45 p.m.*)
Class Advisor Meeting: Faculty/Regent Lounge, McClelland Hall Room 123
Class Dinners

Tuesday, January 6th

8:00 a.m.–11:30 a.m.
9:00 a.m.–9:30 a.m.
11:30 a.m.–12:45 p.m.
12:45 p.m.–2:45 p.m.

Core Classes: Individual Classrooms, McClelland Hall (*Break: 9:30–10:00 a.m.*)
Class Advisor Meeting: Faculty/Regent Office, McClelland Hall Room 123
Lunch: Memorial Hall Student Union North Ballroom
Elective Classes: Individual Classrooms, McClelland Hall

Wednesday, January 7th

8:00 a.m.–10:00 a.m.
10:30 a.m.–12:30 p.m.
12:30 p.m.–1:45 p.m.
1:45 p.m.–5:00 p.m.
2:00 p.m.–2:30 p.m.
6:30 p.m.–7:30 p.m.
7:30 p.m.–10:30 p.m.

Elective Classes: Individual Classrooms, McClelland Hall (*Break: 10–10:30 a.m.*)
Elective Classes: Individual Classrooms, McClelland Hall
Lunch: Memorial Hall Student Union North Ballroom
Core Classes: Individual Classrooms, McClelland Hall (*Break: 3:15–3:30 p.m.*)
Class Advisor Meeting: Faculty/Regent Office, McClelland Hall Room 123
Graduation Ceremony: JW Marriott Starr Pass
Big Bash: JW Marriott Starr Pass

Thursday, January 8th

8:00 a.m.–11:30 a.m.
9:00 a.m.–9:30 a.m.
11:30 a.m.–12:45 p.m.
12:45 p.m.–4:00 p.m.
4:00 p.m.

Core Classes: Individual Classrooms, McClelland Hall (*Break: 9:30–10:00 a.m.*)
Class Advisor Meeting: Faculty/Regent Office, McClelland Hall Room 123
Lunch: Memorial Hall Student Union North Ballroom
Core Classes: Individual Classrooms, McClelland Hall (*Break: 2:15–2:30 p.m.*)
2015 Winter Institute Concludes



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2015 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

Class Advisors

Jack Lank

Silent Auction

Stephanie Parton
Robert Medler
Rick Howe

Professional Consultations

Ruth Littlefield
Kasey Cronquist
Bill Lee

Scholarships

Ruth Littlefield
Nick Kieffer
Kasey Cronquist

Sponsorships

Lisa Krueger
Rick Howe
Nick Kieffer

Institute Kickoff

Lisa Krueger
Ed Stolmaker
Robert Medler
Rick Howe

Big Bash

Lisa Krueger
Ed Stolmaker
Robert Medler
Rick Howe

Course Audits

Blain Andera
Nick Kieffer

Lunch Roundtable Discussions

Blain Andera
Nick Kieffer

Association Dinner

Stephanie Parton
Kasey Cronquist



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2014 WINTER INSTITUTE ATTENDEE STATE BREAKDOWN

204 Attendees from 35 states and the District of Columbia

State, Number of Attendees, %

Alabama, 4, 1.96%	Mississippi, 3, 1.47%
Alaska, 3, 1.47%	Missouri, 2, 0.98%
Arizona, 15, 7.35%	Montana, 1, 0.49%
Arkansas, 10, 4.90%	Nebraska, 6, 2.94%
California, 12, 5.88%	New Mexico, 4, 1.96%
Colorado, 3, 1.47%	North Carolina, 1, 0.49%
District of Columbia, 16, 7.84%	Ohio, 5, 2.45%
Florida, 2, 0.98%	Oklahoma, 20, 9.80%
Georgia, 1, 0.49%	Oregon, 2, 0.98%
Idaho, 3, 1.47%	Pennsylvania, 1, 0.49%
Illinois, 3, 1.47%	South Dakota, 3, 1.47%
Indiana, 3, 1.47%	Texas, 26, 12.75%
Iowa, 11, 5.39%	Utah, 3, 1.47%
Kansas, 5, 2.45%	Virginia, 4, 1.96%
Louisiana, 2, 0.98%	Washington, 7, 3.43%
Maine, 1, 0.49%	Wisconsin, 6, 2.94%
Michigan, 3, 1.47%	Wyoming, 10, 4.90%
Minnesota, 3, 1.47%	

Top Increase Since 2013:

District of Columbia	+6
Arizona	+4
Arkansas	+3
Ohio	+3
Texas	+3

Most Attended in 2013, Texas with 23

Most Attended in 2014, Texas with 26

Winter Institute 2014

