

BOARD OF REGENTS REPORT



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

WINTER CHAIRMAN'S REPORT, 2017 WINTER

What a great 2017 Winter Institute! The Board of Regents, Class Advisors, faculty, and awesome Institute Staff deserve much recognition for a job well done! Although we did not hit our goal for enrollment numbers, we still had fantastic attendance. Our goal was 258, with 94 first-years, and we had overall enrollment of 216 with 67 first-year attendees.

I look back at the week and consider the many successes. The board did a fantastic job of networking and mingling with the attendees; they were made to feel welcomed from the minute registration started until the final class dismissed when the attendees went through the reception line on their way out the door. Another huge success was the silent auction and on-site fundraising, for which we were able to raise over \$8,000. It was certainly a great effort by the board and advisors to raise awareness of the importance of fundraising for the scholarships for Winter Institute.

Graduation and the Big Bash at the JW Marriott proved to again be a first class event for the graduates and everyone else in attendance. The location, food, atmosphere, class speeches, and graduation ceremony truly made the evening one to remember for the graduates, and it also set the stage for the future graduates.

Planning for 2018 Winter Institute began on-site before 2017 concluded. Incoming Chair Stephanie Parton, IOM, CAE and incoming Vice Chair Nick Kieffer, IOM, CP are already working on recruitment for 2018. Regents have been assigned to committees and are well on their way to planning another successful Winter Institute.

The Winter team of passionate and committed Board of Regent members and Class Advisors volunteer their time and talent each year to the success of the Winter Institute program. I'd like to give a special thanks to the Board of Trustees Chair, Joe Henning, IOM, CAE, ACE for joining us on-site and for his dedication and commitment to the Institute program.

The Institute staff certainly deserves most of the credit for the success of Winter Institute! Karyn and her team of professionals provide every site with the tools and expertise we need to make this a fantastic program for all of the association and chamber professionals that attend.

I would like to thank the entire 2017 Institute team for the honor and privilege to serve as the Chair this year. It was truly an awesome experience that I will forever treasure. What an honor to work with such talented leaders in our industry, thank you!

Submitted by: Blain Andera, IOM
Chair, Winter Institute Board of Regents

BOARD OF REGENTS REPORT



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MIDWEST CHAIRMAN'S REPORT, 2017 WINTER

The Midwest Board of Regents has been hard at work to meet the attendance numbers given to us. Our goal is 148 overall with 50 first-year attendees. Every regent received his or her IOM at the Midwest site and we absolutely love the city of Madison and the laid back Midwest 'vibe' at our site.

In D.C. we had a lot of discussion about how we could meet our aggressive goals this year. We talked about the responsibility of each regent to reach out to his or her peers and other leaders in the association and chamber world to build bridges for Institute. We agreed to each make "4 asks" for the program, with at least one of those asks meant to be to a state executives association to warm them up to the program. Other asks are to peers in our region or others that we may run across.

We also talked extensively about the Board scholarships and I feel that we all have a better understanding of how those are working this year. We have renewed our commitment to give those away through our individual recruitment efforts and I'm excited to see how we perform on that measure.

Beyond recruitment, we have set an aggressive goal to raise at least \$5,000 through our on-site silent auction and other fundraising activities. We typically raise just a little over \$3,000. We have a couple new regents helping to head this up and they have a lot of ideas on how to help get us there. We have been inspired by the Winter Board of Regents' excellent example on this topic.

Another goal included "refreshing" our social events during the week. For a couple years we found that classes did not want to hang around at the Big Bash and preferred to go out to the many great local establishments to celebrate with their peers, so we dialed back the entertainment portion and worked to let them go a little earlier. Based upon feedback last year, we are going to change that up once again and go back to more traditional Big Bash format.

We're also putting renewed resources into our social media efforts. We understand how important it is to the future growth and awareness of the program and feel that we can continue to improve on this topic.

Our recruitment of Class Advisors just concluded and our Vice Chair Dawn Johnson has put together an excellent team to work with our attendees in Madison. We'll soon be assigning our Regent Partners.

I'm privileged to be working with an amazing group of regents at the Midwest site. We've had great discussions both in person and on our conference call. Everyone feels energized to help make this one of our best years yet in Madison!

Submitted by: Jodie A. Perry, IOM
Chair, Midwest Institute Board of Regents

BOARD OF REGENTS REPORT



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SOUTHEAST CHAIRMAN'S REPORT, 2017 WINTER

The Southeast Board of Regents has a goal of 247 attendees and 78 first-years, and we feel confident in our ability to meet and exceed this goal. To reach and surpass our goal, we are focusing on specific growth opportunities within the segment of governmental affairs executives, as well as the states of Arkansas, Louisiana and West Virginia.

Additionally, we plan to (1) utilize association alumni as a recruitment resource, (2) proactively engage state organizations/associations on the benefits of Institute, (3) commit attention to retention with the first-third-year attendees from last year, (4) remain focused on using Board Scholarships to recruit new first-year attendees and (5) utilize Institute social media avenues through the Southeast Board of Regents' individual 'circles of influence' to share the Institute story.

The Southeast Board of Regents would like to thank the U.S. Chamber Foundation staff for making the schedule change this year. Early comments have been overwhelmingly positive from our returning attendees, volunteers, and the regents.

Submitted by: Kimberly Dahlsten, IOM
Chair, Southeast Board of Regents

BOARD OF REGENTS REPORT



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WEST CHAIRMAN'S REPORT, 2017 WINTER

West Institute is well under way toward reaching our goals in 2017. We will be met with challenges along the way and together, our Board of Regents will work to overcome these challenges and host a terrific Institute experience for all attendees. On behalf of the Board of Regents, I would like to update you on our progress since we met in Washington, D.C. last September.

The West Board of Regents is focusing on two primary goals in 2017: recruitment and fundraising.

ATTENDANCE GOAL: 115 TOTAL, 31 FIRST-YEARS

The board has challenged ourselves with recruiting 2-3 individuals each for our first-year class, encouraging diversity by ethnicity, size of organization, type of organization, community size, and job function. To reach these goals, I will be working with our Board of Regents individually on tactics designed to help move the needle on recruitment. One tactic will be focusing on one niche per person. For example, in 2015, I focused on recruiting mid-level managers/directors from Metro Chambers. I was able to recruit two individuals from this group, which helped us hit our overall attendance goal.

A second tactic will be increased social media posts and discussions, specifically focusing on LinkedIn and Twitter, two avenues that have not been as widely used by this site in the past. We will be cognizant of the demographic data shared at the Fall Board Meeting and be strategic in creating a social media plan that targets the right message to the type of individual who most likely will attend Institute, as well as messaging for those segments in which we have the greatest opportunity to grow.

FUNDRAISING GOAL: \$12,000

West Institute is proud of its growing tradition to effectively raise a large amount of money for scholarships to our site. I believe our fundraising success is helpful in recruitment as well, providing a great treasure chest to help entice first-year attendees to the program. This year, a talented group of regents are already hard at work developing a plan to exceed the \$12,000 fundraising goal through the silent auction. By tracking the data of the past four years' auctions, we have identified four primary tactics to ensure success:

- 1) Receive at least two (2) donations from each regent.
- 2) Increase the average value of items to \$200.
- 3) Secure at least five (5) items with a value of \$1,000 or more.
- 4) Get at least 60 items donated though current students or alumni.

This recipe for success has helped us raise an average of approximately \$11,000 for the past two years.

I would like to personally ask the Board of Trustees to support our regents in recruitment to the West site. We must continue to grow West to ensure the success of Institute and I believe our site has a lot to offer beyond the L.A. landscape and weather. Our demographics and retention rates are great; we just need to get them there. If you have multiple staff members attending or can use your influence to encourage new attendees, please consider sending at least one to West. We will take excellent care of them and can most likely offer a scholarship!

Submitted by: Kelle Marsalis, IOM, CCE
Chair, West Board of Regents

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NORTHEAST CHAIRMAN'S REPORT, 2017 WINTER

Our Northeast Board of Regents is eager to build upon the successes of last year's work, particularly our social media outreach with Twitter. We look forward to an excellent year in 2017. Our attendance goals are 170 overall students, including 56 first-years. We are recruiting aggressively and with outstanding new board members, we look to attain or exceed those goals.

We will be increasing contributions for scholarships with a goal of \$6,500. For last year's auction, we returned to our previous system for bidding and find that this system works best at our location.

Customer service will continue to be a focus to ensure our attendees' expectations are met in their journey to becoming better prepared leaders in the nonprofit world. We will again distribute a small gift to all attendees upon their arrival, welcoming them to our site.

We are excited about our Northeast Board of Regents leadership team and are committed to making Institute a memorable success for everyone in attendance.

Submitted by: Steve Clark, IOM, J.D., CFE
Chair, Northeast Board of Regents