



TABLE OF CONTENTS

INSTITUTE FOR ORGANIZATION MANAGEMENT
WINTER BOARD MEETING
FEBRUARY 7, 2017
WEBINAR

Contents:

1. Board of Trustees Roster
2. Agenda
3. Fall Meeting Minutes
4. Nominations
5. Program Updates
6. Boards of Regents' Reports
7. Demographics
8. Winter Institute Survey Results and Feedback



BOARD OF TRUSTEES

2017 ROSTER

CHAIR

Joseph B. Henning, IOM, CAE, ACE
President and CEO
Aurora Regional Chamber of Commerce
43 West Galena Boulevard
Aurora, IL 60506
630-256-3181
jhenning@aurorachamber.com
Term: 2016-2017

VICE CHAIR

Megan A. Lucas, IOM, CEcD
Chief Executive Officer and Chief Economic
Development Officer
Lynchburg Regional Business Alliance
828 Main Street, 12th Floor
Lynchburg, VA 24504
434-847-1447 ext. 314
MeganLucas@lynchburgregion.org
Term: 2016-2017

Blain Andera, IOM

Executive Director
Spirit Lake Chamber of Commerce
PO Box 155
Spirit Lake, IA 51360
712-336-4978
chamber@spiritleakecc.com
Term: 2016-2017

Christin W. Berry, CAE

Senior Director, Business Analytics
ASAE: The Center for Association Leadership
1575 I Street, NW, Suite 1100
Washington, DC 20005
202-326-9514
cberry@asaecenter.org
Term: Standing

CHAIR ELECT

Chris E. Wallace, IOM, CCE
President
Texas Association of Business
1209 Nueces Street
Austin, TX 78701
512-477-1006
cwallace@txbiz.org
Term: 2016-2017

PAST CHAIR

Robert E. Thomas, IOM, CAE, CMP
Senior Director of Operations
Michigan Chamber of Commerce
Executive Director
Michigan Chamber Foundation
600 South Walnut Street
Lansing, MI 48933
517-371-7639
bthomas@michamber.com
Term: 2016-2017

Jeremy L. Arthur, IOM

President and CEO
Chamber of Commerce Association of
Alabama
2 North Jackson Street, Suite 603
Montgomery, AL 36104
334-240-8758
jarthur@bcatoday.org
Term: 2012-2017

Steve Clark, IOM, J.D., CFE

President and CEO
Fayetteville Chamber of Commerce
PO Box 4216
Fayetteville, AR 72701
479-521-1710
sclark@fayettevillear.com
Term: Through 2017



BOARD OF TRUSTEES

2017 ROSTER

Kimberly Dahlsten, IOM
Associate Director of Membership
K-State Alumni Association
1720 Anderson Avenue, 100 Alumni Center
Manhattan, KS 66506
785-532-5067
kdahlsten@k-state.com
Term: Through 2017

Catherine S. Dority, IOM
Director of Marketing
Charleston Area Convention and Visitors
Bureau
423 King Street
Charleston, SC 29403
843-805-3090
cdority@explorecharleston.com
Term: 2011-2018

Teresa L. Eyet, IOM
Senior Director, Conference Programming and
Educational Development
American Health Care Association
1201 L Street, NW
Washington, DC 20005
202-898-2837
teyet@ahca.org
Term: 2015-2017

Kimberly Guida, IOM, CAE
Director of Insurance Services
Rochester Automobile Dealers Association
2024 West Henrietta Road, Building #4
Rochester, NY 14623
585-272-7232
kguida@therada.org
Term: 2014-2017

David Johnson, IOM, CAE
Vice President, Membership
American Society of Interior Designers
1152 15th Street NW, Suite 910
Washington, DC 20005
202-675-2374
djohnson@asid.org
Term: 2015-2017

Kelle Marsalis, IOM, CCE
Vice President, Strategic Initiatives
Dallas Regional Chamber
500 North Akard, Suite 2600
Dallas, TX 75201
214-712-1901
kmarsalis@dallaschamber.org
Term: Through 2017

Matt R. McCormick, IOM, CCE
President
Columbia Chamber of Commerce
300 South Providence Road
Columbia, MO 65205
573-817-9108
mmccormick@columbiachamber.com
Term: 2013-2017

Timothy M. McKee, IOM
Chief Executive Officer
Olathe Chamber of Commerce
18001 West 106th Street, Suite 160
Olathe, KS 66061
913-764-1050
tmckee@olathe.org
Term: 2012-2018



BOARD OF TRUSTEES

2017 ROSTER

Crystal Moore, CAE
Vice President, Professional Development and
Convention
Association of Chamber of Commerce
Executives
1330 Braddock Place, Suite 300
Alexandria, VA 22314
703-998-3550
cmoore@acce.org
Term: Standing

Corey Rosenbusch, IOM, CAE
President and CEO
Global Cold Chain Alliance
1500 King Street, Suite 201
Alexandria, VA 22314
703-373-4300 ext. 213
crosenbusch@gcca.org
Term: 2015-2017

Marnie L. Uhl, IOM, ACE
President and CEO
Prescott Valley Chamber of Commerce
7120 Pav Way, Suite 102
Prescott Valley, AZ 86314
928-772-8857
marnie@pvchamber.org
Term: 2012-2018

Scott Waller, IOM
Executive Vice President and COO
Mississippi Economic Council
PO Box 23276
Jackson, MS 39225
601-969-0022
swaller@mec.ms
Term: 2015-2018

Jodie A. Perry, IOM
President
Richland Area Chamber of Commerce
55 North Mulberry Street
Mansfield, OH 44902
419-522-3211
JPerry@RichlandAreaChamber.com
Term: Through 2017

Raymond P. Towle, IOM, CAE
Vice President, Institute for Organization
Management
Vice President, Political Affairs and Federation
Relations
U.S. Chamber of Commerce
1615 H Street, NW
Washington, DC 20062
202-463-5853
rtowle@uschamber.com
Term: Standing

Tony Vedda, IOM, CCE
President and CEO
North Texas GLBT Chamber of Commerce
3824 Cedar Springs Road, Suite 429
Dallas, TX 75219
214-821-4528
tony.vedda@glbtchamber.org
Term: 2015-2017

BOARD OF TRUSTEES AGENDA



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

2017 WINTER MEETING

FEBRUARY 7, 2017
11:30 A.M.–1:00 P.M. EST
WEBINAR

I. Welcome and Introductions

Joseph B. Henning IOM, CAE, ACE
Chair, Institute for Organization Management
President and CEO, Aurora Regional Chamber of Commerce

II. Approval of Minutes – September 30, 2016

III. Approval of Nominating Committee Report

IV. Program Updates

- a. Marketing
- b. Social Media
- c. State Partnerships
- d. Scholarships
- e. Fundraising
- f. Winter Geographic Breakdown

V. Boards of Regents' Reports

- a. Winter Board of Regents report
- b. Midwest Board of Regents report
- c. Southeast Board of Regents report
- d. West Board of Regents report
- e. Northeast Board of Regents report

VI. Discussion and Brainstorming

- a. Absences and Response Plan
- b. Course Audits and Evaluations
- c. Volunteer Offboarding
- d. Recruitment Efforts

VII. Chairman's Report

VIII. Other Business

IX. Adjournment

Next In-Person Meeting: October 5, 2017 in Washington, D.C.

FALL MEETING MINUTES



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

FALL 2016 MEETING

MEETING MINUTES
SEPTEMBER 30, 2016
8:30 A.M.–10:00 A.M. EDT
U.S. CHAMBER OF COMMERCE
WASHINGTON, DC

In attendance: Robert E. Thomas, IOM, CAE, CMP; Joseph B. Henning, IOM, CAE, ACE; Matt G. Pivarnik, IOM, CCE; Blain Andera, IOM; Jeremy L. Arthur, IOM; Christin W. Berry, CAE; Catherine S. Dority, IOM; Teresa L. Eyet, IOM; Mark L. Field, IOM, CCE; Kimberly Guida, IOM, CAE; David Johnson, IOM, CAE; Megan A. Lucas, IOM, CEcD; Matt R. McCormick, IOM, CCE; Timothy M. McKee, IOM; Crystal Moore, CAE; Marnie L. Uhl, IOM, ACE; Tony Vedda, IOM, CCE; Scott Waller, IOM; Raymond P. Towle, IOM, CAE; Karyn K. MacRae, IOM, CAE, CMP; Shelby A. Parish, IOM, CMP; Andrew Y. Weller; Carly Flick

Observers: Kimberly Dahlsten, IOM; Kelle Marsalis, IOM, CCE; Stephanie M. Parton, IOM, CAE; Jodie A. Perry, IOM

Not in attendance: L. Dean Faile, IOM; Corey Rosenbusch, IOM, CAE; Chris E. Wallace, IOM, CCE

I. Welcome and Introductions

Robert E. Thomas, IOM, CAE, CMP welcomed everyone to the meeting and thanked them for coming.

II. Approval of Minutes – February 10, 2016

The minutes from the February 10, 2016 webinar were unanimously approved.

III. Approval of Nominating Committee Reports

The Board of Trustees, Midwest Board of Regents, Southeast Board of Regents, West Board of Regents, and Northeast Board of Regents nominating committee reports were all approved with no changes. The Curriculum Committee nominating committee report was approved with an amendment (included below).

BOARD OF TRUSTEES

Chair

Joseph B. Henning, IOM, CAE, ACE
President and CEO
Aurora Regional Chamber of Commerce
Aurora, IL
Term: 2016-2017

Chair Elect

Chris E. Wallace, IOM, CCE
President
Texas Association of Business
Austin, TX
Term: 2016-2017

Vice Chair

Megan A. Lucas, IOM, CEcD
Chief Executive Officer and Chief Economic
Development Officer
Lynchburg Regional Chamber Alliance
Lynchburg, VA
Term: 2016-2017

FALL MEETING MINUTES



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

FALL 2016 MEETING

Past Chair

Robert E. Thomas, IOM, CAE, CMP
Senior Director of Operations, Michigan Chamber of
Commerce
Executive Director, Michigan Chamber Foundation
Lansing, MI
Term: 2016-2017

Board of Regents Chairs (one-year term):

Blain Andera, IOM
Executive Director
Spirit Lake Chamber of Commerce
Spirit Lake, IA
Term: Through Winter 2017 as *Chair of Winter BOR*
(confirmed February 10, 2016)

Steve Clark, IOM, J.D., CFE
President and CEO
Fayetteville Chamber of Commerce
Fayetteville, AR
Term: Through 2017 as *Chair of Northeast BOR*

Kimberly Dahlsten, IOM
Vice President, Director of Membership
Manhattan Area Chamber of Commerce
Manhattan, KS
Term: Through 2017 as *Chair of Southeast BOR*

Kelle Marsalis, IOM, CCE
Vice President, Strategic Initiatives
Dallas Regional Chamber
Dallas, TX
Term: Through 2017 as *Chair of West BOR*

Jodie A. Perry, IOM
President
Richland Area Chamber of Commerce
Mansfield, OH
Term: Through 2017 as *Chair of Midwest BOR*

Curriculum Committee Chair:

Megan A. Lucas, IOM, CEcD
Chief Executive Officer and Chief Economic
Development Officer
Lynchburg Regional Chamber Alliance
Lynchburg, VA
Term: Through 2017 as *Chair of Curriculum Committee*

At-large position (one-year term):

Teresa L. Eyet, IOM
Senior Director, Conference Programming and
Education Development
American Health Care Association
Washington, DC
Term: 2016-2017

Corey Rosenbusch, IOM, CAE
President and CEO
Global Cold Chain Alliance
Alexandria, VA
Term: 2016-2017

Tony Vedda, IOM, CCE
President and CEO
North Texas GLBT Chamber of Commerce
Dallas, TX
Term: 2016-2017

At-large position (two-year term):

Scott Waller, IOM
Executive Vice President and COO
Mississippi Economic Council
Jackson, MS
Term: 2016-2018

Term Renewals (At-large, two-year terms):

Catherine S. Dority, IOM
Director of Marketing
Charleston Area Convention and Visitors Bureau
Charleston, SC
Term: 2012-2018

Timothy M. McKee, IOM
Chief Executive Officer
Olathe Chamber of Commerce
Olathe, KS
Term: 2012-2018

Marnie L. Uhl, IOM, ACE
President and CEO
Prescott Valley Chamber of Commerce
Prescott Valley, AZ
Term: 2012-2018

FALL MEETING MINUTES



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

FALL 2016 MEETING

REMAINING ON BOARD, NO ACTION REQUIRED

Standing:

Christin Berry, CAE
Senior Director, Business Analytics
ASAE: The Center for Association Leadership
Washington, DC
Term: Standing

Crystal Moore, CAE
Vice President, Professional Development and
Convention
Association of Chamber of Commerce Executives
Alexandria, VA
Term: Standing

Raymond P. Towle, IOM, CAE
Vice President, Institute for Organization
Management
Vice President, Political Affairs and Federation
Relations
U.S. Chamber of Commerce
Washington, DC
Term: Standing

At-large (two-year term):

Jeremy L. Arthur, IOM
President and CEO
Chamber of Commerce Association of Alabama
Montgomery, AL
Term: 2013-2017

Kimberly Guida, IOM, CAE
Director of Insurance Services
Rochester Automobile Dealers Association
Rochester, NY
Term: 2015-2017

David Johnson, IOM, CAE
Vice President, Membership
American Society of Interior Designers
Washington, DC
Term: 2015-2017

Matt R. McCormick, IOM, CCE
President
Columbia Chamber of Commerce
Columbia, MO
Term: 2013-2017

ROTATING OFF BOARD

Board of Regents Chairs (one-year term):

Mark L. Field, IOM, CCE
Senior Vice President
Knoxville Chamber of Commerce
Knoxville, TN
Term: Through 2016 *as Chair of Southeast BOR*

Jack Lank, IOM
President and CEO
The United Regional Chamber of Commerce
Attleboro, MA
Term: Through Winter 2016 *as Chair of Winter BOR*
(confirmed February 10, 2015)

At-large (one-year term):

L. Dean Faile, IOM
President and CEO
Lancaster County Chamber of Commerce
Lancaster, SC
Term: 2015-2016

Chair Elect:

Kimberly Nastasi, IOM, CAE
Chief Executive Officer
Mississippi Gulf Coast Chamber of Commerce
Gulfport, MS
Term: 2015-2016

Past Chair:

Matt G. Pivarnik, IOM, CCE
President and CEO
Greater Topeka Chamber of Commerce & GO
Topeka
Topeka, KS
Term: 2015-2016

CURRICULUM COMMITTEE

Chair

Megan A. Lucas, IOM, CEd
Chief Executive Officer and Chief Economic
Development Officer
Lynchburg Regional Business Alliance
Lynchburg, VA
Term: 2015-2017

FALL MEETING MINUTES



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

FALL 2016 MEETING

Vice Chair

Jeremy L. Arthur, IOM
President and CEO
Chamber of Commerce Association of Alabama
Montgomery, AL
Term: 2015-2017

Board of Regents Vice Chairs (one-year term):

Bryan Daniels, IOM, CCE, CEcD
President and CEO
Blount Partnership
Maryville, TN
Term: 2016-2017 as *Vice Chair of Southeast BOR*

Dawn Johnson, IOM
Vice President
Muskegon Lakeshore Chamber of Commerce
Muskegon, MI
Term: 2016-2017 as *Vice Chair of Midwest BOR*

Brad Lacy, IOM, CCE
President and CEO
Conway Area Chamber of Commerce
Conway, AR
Term: 2016-2017 as *Vice Chair of West BOR*

Stephanie M. Parton, IOM, CAE
Director, Marketing Communications
Indiana CPA Society
Indianapolis, IN
Term: 2016-2017 as *Vice Chair of Winter BOR*
(confirmed February 10, 2016)

Carrie Stuart, IOM
President
Gettysburg Adams Chamber of Commerce
Gettysburg, PA
Term: 2016-2017 as *Vice Chair of Northeast BOR*

At-large (two-year term):

Robert Medler, IOM
Vice President, Government Affairs
Tucson Metro Chamber
Tucson, AZ
Term: 2016-2018

Jacqueline Rakers, IOM, PFMM
Executive Director
Illinois Association of Mutual Insurance Companies
Ohlman, IL
Term: 2016-2018

Term Renewals (two-year term):

Timothy M. McKee, IOM
Chief Executive Officer
Olathe Chamber of Commerce
Olathe, KS
Term: 2014-2018

Robert E. Thomas, IOM, CAE, CMP
Senior Director of Operations, Michigan Chamber of
Commerce
Executive Director, Michigan Chamber Foundation
Lansing, MI
Term: 2012-2018

Faculty Member (two-year term):

Brian Baker
Vice President, Sales and Marketing
Chateau Montelena Winery
Santa Rosa, CA
Term: 2014-2018

REMAINING ON COMMITTEE, NO ACTION REQUIRED

Standing:

Crystal Moore, CAE
Vice President, Professional Development and
Convention
Association of Chamber of Commerce Executives
Alexandra, VA
Term: Standing

Christin W. Berry, CAE
Senior Director, Business Analytics
ASAE: The Center for Association Leadership
Washington, DC
Term: Standing

At-large (two-year term):

Catherine S. Dority, IOM
Director of Marketing
Charleston Area Convention and Visitors Bureau
Charleston, SC
Term: 2013-2017

FALL MEETING MINUTES



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

FALL 2016 MEETING

Robert J. Foulks, IOM, CAE, CPA, CGMA
CFO and Deputy CEO
Wisconsin Medical Society
Madison, WI
Term: 2011-2017

Kellie K. Lowery, IOM, CAE, CPA
Controller
NTCA – The Rural Broadband Association
Arlington, VA
Term: 2011-2017

Matt R. McCormick, IOM, CCE
President
Columbia Chamber of Commerce
Columbia, MO
Term: 2013-2017

Morri Yancy, IOM
President
Lake Guntersville Chamber of Commerce
Guntersville, AL
Term: 2015-2017

Faculty Member (two-year term):

Steven Swafford
CEO and Balance Warrior
Leadership Outfitters
Santa Monica, CA
Term: 2015-2017

ROTATING OFF COMMITTEE

Board of Regents Vice Chairs (one-year term):

Blain Andera, IOM
Executive Director
Spirit Lake Chamber of Commerce
Spirit Lake, IA
Term: 2015-2016 as *Vice Chair of Winter BOR*
(confirmed February 10, 2016)

Steve Clark, IOM, J.D., CFE
President and CEO
Fayetteville Chamber of Commerce
Fayetteville, AR
Term: 2015-2016 as *Vice Chair of Northeast BOR*

Kimberly Dahlsten, IOM
Vice President, Director of Membership
Manhattan Area Chamber of Commerce
Manhattan, KS
Term: 2015-2016 as *Vice Chair of Southeast BOR*

Kelle Marsalis, IOM, CCE
Vice President, Strategic Initiatives
Dallas Regional Chamber
Dallas, TX
Term: 2015-2016 as *Vice Chair of West BOR*

Jodie A. Perry, IOM
President
Richland Area Chamber of Commerce
Mansfield, OH
Term: 2015-2016 as *Vice Chair of Midwest BOR*

At-large (two-year term):

Ali Crain, IOM, CCE, ACE
Executive Director
Kentucky Chamber of Commerce Executives
Frankfort, KY
Term: 2013-2017

Matt G. Pivarnik, IOM, CCE
President and CEO
Greater Topeka Chamber of Commerce and GO
Topeka
Topeka, KS
Term: 2012-2016

MIDWEST BOARD OF REGENTS

Chair

Jodie A. Perry, IOM
President
Richland Area Chamber of Commerce
Mansfield, OH
Term: 2016-2017

Vice Chair

Dawn Johnson, IOM
Vice President
Muskegon Lakeshore Chamber of Commerce
Muskegon, MI
Term: 2016-2017

FALL MEETING MINUTES



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

FALL 2016 MEETING

Past Chair

Teresa L. Eyt, IOM
Senior Director, Conference Programming and
Education Development
American Health Care Association
Washington, DC
Term: 2016-2017

The following individuals are nominated:

Jenna Armstrong, IOM
Chief Executive Officer
Lake Houston Area Chamber of Commerce
Humble, TX
Term: 2016-2018

William T. Fleming, IOM
Executive Director
Pekin Area Chamber of Commerce
Pekin, IL
Term: 2016-2018

Lisa Weitzel, IOM, CAE
President
Illinois Association of Chamber of Commerce
Executives
Springfield, IL
Term: 2016-2018

Term Renewals (two-year term):

Lisa Hoyt, IOM
Membership Director
Petoskey Regional Chamber of Commerce
Petoskey, MI
Term: 2014-2018

Angela Whitcomb, IOM
President
Shakopee Chamber of Commerce
Shakopee, MN
Term: 2014-2018

REMAINING ON BOARD, NO ACTION REQUIRED

Rene Gellerman, IOM
Senior Vice President, Membership
Quad Cities Chamber of Commerce
Davenport, IA
Term: 2011-2017

Jeffrey Griffin, IOM
President and CEO
Peoria Area Chamber of Commerce and The CEO
Council
Peoria, IL
Term: 2015-2017

Heidi Gullickson, IOM
Executive Director
Brookings Area United Way
Brookings, SD
Term: 2015-2017

Tracey Halliday, IOM
Vice President, Communications
American Beverage Association
Washington, DC
Term: 2015-2017

Stacey L. Wilson, IOM, CAE
Director, Learning and Collaboration
Indiana CPA Society
Indianapolis, IN
Term: 2015-2017

Heidi Zich, IOM
Executive Vice President
Home Builders Association of the Fox Cities
Appleton, WI
Term: 2015-2017

ROTATING OFF BOARD

Ali Crain, IOM, CCE, ACE
Executive Director
Kentucky Chamber of Commerce Executives
Frankfort, KY
Term: 2013-2017

Jacqueline Rakers, IOM, PFMM
Executive Director
Illinois Association of Mutual Insurance Companies
Ohlman, IL
Term: 2010-2016

Michael J. Paone, IOM
Vice President, Member Services
Joliet Region Chamber of Commerce & Industry
Joliet, IL
Term: 2010-2016

FALL MEETING MINUTES



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

FALL 2016 MEETING

Laura Schoen Carbonneau, IOM
Chief Executive Officer
Pierre Area Chamber of Commerce
Pierre, SD
Term: 2010-2016

Allison B. Walden, IOM
Senior Vice President of Resource Development
Tulsa Regional Chamber
Tulsa, OK
Term: 2016-2018

SOUTHEAST BOARD OF REGENTS

Chair

Kimberly Dahlsten, IOM
Vice President, Director of Membership
Manhattan Area Chamber of Commerce
Manhattan, KS
Term: 2016-2017

Term Renewals (two-year term):

Rita Berry, IOM, CCEC
President and CEO
Greater Summerville/Dorchester County Chamber of
Commerce
Summerville, SC
Term: 2014-2018

Vice Chair

Bryan Daniels, IOM, CCE, CEcD
President and CEO
Blount Partnership
Maryville, TN
Term: 2016-2017

Christine Kennedy, IOM, CPC, ELI-MP
President
Lynchburg Regional Business Alliance
Lynchburg, VA
Term: 2014-2018

Past Chair

Mark L. Field, IOM, CCE
Senior Vice President of Membership
Knoxville Chamber of Commerce
Knoxville, TN
Term: 2016-2017

REMAINING ON BOARD, NO ACTION REQUIRED

Elizabeth Horton, IOM
Senior Vice President of Operations
Greenville Chamber of Commerce
Greenville, SC
Term: 2013-2017

The following individuals are nominated:

Elisabeth Deville, IOM
Vice President, Finance and Administration
SWLA Alliance
Lake Charles, LA
Term: 2016-2018

Rick Roden, IOM
President and CEO
Greater Jackson County Chamber of Commerce
Scottsboro, AL
Term: 2015-2017

Henry Florsheim, IOM
President and CEO
Wichita Falls Chamber of Commerce
Wichita Falls, TX
Term: 2016-2018

Teri H. Smiley, IOM, GCCE
President
Walton County Chamber of Commerce
Walton, GA
Term: 2013-2017

Pammie Jimmar, IOM
Small Business and Events Director
Chamber of Commerce of Huntsville/Madison
County
Huntsville, AL
Term: 2016-2018

Raymund Villegas, IOM
Chapter Relations Manager
Institute of Internal Auditors
Altamonte Springs, FL
Term: 2015-2017

FALL MEETING MINUTES



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

FALL 2016 MEETING

Scott Waller, IOM
Executive Vice President and COO
Mississippi Economic Council
Jackson, MS
Term: 2013-2017

Jim Johnson, IOM
President and CEO
Lufkin/Angelina County Chamber of Commerce
Lufkin, TX
Term: 2016-2018

ROTATING OFF BOARD

L. Dean Faile, IOM
President and CEO
Lancaster County Chamber of Commerce
Lancaster, SC
Term: 2009-2016

Gene Terry, IOM, CAE
Executive Director, American Society of Hand
Therapists
Association Headquarters, Inc.
Mt. Laurel, NJ
Term: 2016-2018

Morri Yancy, IOM
President
Lake Guntersville Chamber of Commerce
Lake Guntersville, AL
Term: 2010-2016

Jennifer Reiser, IOM
Chief Operating Officer
Billings Area Chamber of Commerce
Billings, MT
Term: 2016-2018

WEST BOARD OF REGENTS

Chair

Kelle Marsalis, IOM, CCE
Vice President, Strategic Initiatives
Dallas Regional Chamber of Commerce
Dallas, TX
Term: 2016-2017

Katie Stice, IOM, ACE
Vice President of Core Services, Regional President
Greater Coachella Valley Chamber of Commerce
La Quinta, CA
Term: 2016-2018

Vice Chair

Brad Lacy, IOM, CCE
President and CEO
Conway Area Chamber of Commerce
Conway, AR
Term: 2016-2017

REMAINING ON BOARD, NO ACTION REQUIRED

Alysia Bell, IOM
Director, Education Business Coalition
Los Angeles Area Chamber of Commerce
Los Angeles, CA
Term: 2015-2017

Past Chair

Tony Vedda, IOM, CCE
President and CEO
Dallas, TX
North Texas GLBT Chamber of Commerce, Inc.
Term: 2016-2017

Jason E. Camis, IOM
President and CEO
Gardner Edgerton Chamber of Commerce
Gardner, KS
Term: 2015-2017

Tony Felker, IOM, CCE
President and CEO
Frisco Chamber of Commerce
Frisco, TX
Term: 2013-2017

The following individuals are nominated:

Ryan Evans, IOM
President
Utah Solar Energy Association
Salt Lake City, UT
Term: 2016-2018

Alison Grems, IOM
President and CEO
Canandaigua Chamber of Commerce
Canandaigua, NY
Term: 2013-2017

FALL MEETING MINUTES



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

FALL 2016 MEETING

Lisa Hermes, IOM
President
McKinney Chamber of Commerce
McKinney, TX
Term: 2015-2017

Ray Hernandez, IOM
President
Lewisville Area Chamber of Commerce
Lewisville, TX
Term: 2013-2017

Russell Lahodny, IOM
Vice President, Local Chamber Relations
California Chamber of Commerce
Sacramento, CA
Term: 2011-2017

Heidi Peterson, IOM
Manager, Marketing and Membership
Wyoming Taxpayers Association
Cheyenne, WY
Term: 2015-2017

ROTATING OFF BOARD

David N. Butler, IOM
Executive Director, California Society of
Anesthesiologists
Advocacy & Management Group, Inc.
Sacramento, CA
Term: 2014-2016

Marianne Virgili, IOM, CCE
President and CEO
Glenwood Springs Chamber Resort Association
Glenwood Springs, CO
Term: 2010-2016

NORTHEAST BOARD OF REGENTS

Chair

Steve Clark, IOM, J.D., CFE
President and CEO
Fayetteville Chamber of Commerce
Fayetteville, AR
Term: 2016-2017

Vice Chair

Carrie Stuart, IOM
President
Gettysburg Adams Chamber of Commerce
Gettysburg, PA
Term: 2016-2017

Past Chair

Chris E. Wallace, IOM, CCE
President
Texas Association of Business
Austin, TX
Term: 2016-2017

The following individuals are nominated:

Jeffrey S. Albright, IOM
Director, Membership
PA Chamber of Business and Industry
Harrisburg, PA
Term: 2016-2018

Marvin Bond, IOM
Vice President, Investor Relations
Greater Irving-Las Colinas Chamber of Commerce
Irving, TX
Term: 2016-2018

Patricia A. Jones, IOM, CAE
Managing Director, Executive and Board Operations
American Society of Civil Engineers
Reston, VA
Term: 2016-2018

Jacqueline Lovejoy, IOM
President
Dearborn Area Chamber
Dearborn, MI
Term: 2016-2018

Robert Uhler, IOM
Regional Manager
Western Equipment Dealers Association
Kansas City, MO
Term: 2016-2018

FALL MEETING MINUTES



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

FALL 2016 MEETING

Term Renewals (two-year term):

Gregory D. Buckler, IOM, MBA, MSM
President and CEO
Lebanon Valley Chamber of Commerce
Lebanon, PA
Term: 2012-2018

Dan Lemyre, IOM, CAE
Executive Director, Society for Biomaterials
Association Headquarters, Inc.
Mt. Laurel, NJ
Term: 2014-2018

Peter McNamara, IOM, CAE, J.D.
President
New Hampshire Automobile Dealers Association
Concord, NH
Term: 2014-2018

REMAINING ON BOARD, NO ACTION REQUIRED

Kate Conroy, IOM
Director, Member Services and Programs
New Jersey Business & Industry Association
Trenton, NJ
Term: 2015-2017

Elizabeth Knowlton, IOM, CCE
Executive Vice President
SWLA Economic Development Alliance and
Chamber SWLA
Lake Charles, LA
Term: 2015-2017

Douglas O'Flaherty, IOM
South Carolina Director of Operations
South Carolina Restaurant and Lodging Association
Columbia, SC
Term: 2015-2017

Joanne White, IOM
Executive Director
Greater West Plains Area Chamber of Commerce
West Plains, MO
Term: 2015-2017

ROTATING OFF BOARD

Karen M. DelVecchio, IOM
Executive Vice President
Bridgeport Regional Business Council
Bridgeport, CT
Term: 2010-2016

Kimberly Guida, IOM, CAE
Director of Insurance Services
Rochester Automobile Dealers Association
Rochester, NY
Term: 2009-2016

Claire Louder, IOM, CAE, MPP
President and CEO
West Anne Arundel County Chamber of Commerce
Odenton, MD
Term: 2011-2017

Kellie K. Lowery, IOM, CAE, CPA
Controller
NTCA – The Rural Broadband Association
Arlington, VA
Term: 2010-2016

FALL MEETING MINUTES



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

FALL 2016 MEETING

IV. Consent Agenda

The Winter Board of Regents, Midwest Board of Regents, Southeast Board of Regents, West Board of Regents, and Northeast Board of Regents Chairman's reports were all approved.

V. Curriculum Committee Report

The Board of Trustees approved the Curriculum Committee's report which included the recommendations below. It was mentioned that the effect that social and economic issues has on attendees and on the curriculum will be a topic of discussion at the next meeting.

C430 Becoming a Strategic Manager

Title Change

- New course title: C430 Becoming a Strategic Leader.

Course Description Change: The course description was updated in response to the title change.

- New course description: Strategic leaders foster collaborative teams that can position the organization toward success within the business community and external organizations.

Objective Change: The second objective was interchanged with the second objective of C230 Managers Who Motivate and updated.

- New second objective: Understanding the diversity of the business community and external organizations.

C230 Managers Who Motivate

Objective Change: The second objective was changed. It was previously the second objective in C430.

- New second objective: Setting expectations and coaching your team.

C380 Volunteer Management

Title Change

- New course title: C380 Volunteer Development

Course Description Change: The course description was updated.

- New course description: It is challenging to identify, attract, and retain quality volunteer leaders. Examine leadership and succession programs in nonprofit organizations through strategic volunteer development.

C470 Advocacy and Alliances

Course Description Change: The course description was changed.

- New course description: Once your advocacy program is in place, you are ready to take the next steps. Position your organization to be a leader in advocacy within the community and external organizations. Delve into the ins and outs of the different channels of coalition building.

Objective Change: The third objective was removed and replaced with a new objective.

- New third objective: Building and managing relationships with your elected officials.

C490 Organization Leadership for the Future

Objective Change: The first objective was changed.

- New first objective: Utilizing situational awareness.

C261 Events: Strategy and Operations

Course Description Changes: All three objectives were changed.

- New first objective: Creating events with a strategic purpose.
- New second objective: Utilizing technology to improve the bottom line and increase attendee satisfaction.
- New third objective: Examining financial management, stakeholder management, and event design.

FALL MEETING MINUTES



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

FALL 2016 MEETING

E163 Communicating Through the Media

No changes were made to the title, course description, or objectives.

E161 Business Communication Technology Trends (#OrgComm)

Title Change: The title was changed to remove the phrase in parenthesis.

- New title: E161 Business Communication Technology Trends

E250 PACs and Political Endorsements

Objective Change: The first objective was removed and replaced.

- New first objective: Addressing ballot initiatives and referendums.

VI. Updates and Discussion

a. Scholarships and Incentives Update

Staff provided an overview of scholarship and incentive use in 2016, and a robust discussion followed. Staff proposed to remove the Faculty and Board Scholarships. The majority of the discussion was focused on the Board Scholarship. Key points and questions that were raised are included below.

- Overall, the Board Scholarship had not been properly used for its original purpose of recruiting attendees who would not otherwise have attended.
- In some cases, it was more about who you know versus qualification and need.
- Having only been implemented in 2016, there is not enough data to support discontinuing the scholarship.
- Faculty members use the scholarships as a marketing tool, however only 13 faculty members used this incentive last year.
- There is need to streamline the Board Scholarship process, making it more objective and creating accountability for the scholarship committee.
- Everyone agreed that some sort of application should be required for the Board Scholarship and that no refunds should be issued after the fact.
- Suggestion to continue with a streamlined version of the Board Scholarship and discontinue the Faculty Scholarship.
- Suggestion to benchmark and define success as equal (26) or greater participation in 2017.
- It was reported that an additional scholarship deadline was added for the West and Northeast sites.
- Staff is looking for suggestions to rename the Pay it Forward and Friends and Family incentives.

In conclusion, staff was to take all suggestions and recommendations regarding the Board and Faculty Scholarships and make a final decision in the following week.

FALL MEETING MINUTES



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

FALL 2016 MEETING

b. Diversity Recruitment Update

It was reported that efforts were positive in 2016, but there is still room to grow, particularly in underserved communities. A suggestion was made to use ambassadors to reach out to new audiences and organizations that have not historically sent many Institute attendees. Trustees were encouraged to keep diversity at the forefront of recruitment efforts.

c. Open Forum: Community Trends

It was established that Institute does not currently have a diversity statement, but is open to creating one. The need to combat negative attitudes felt about the U.S. Chamber and its policies was mentioned.

A diversity statement task force was created and will be headed by Megan Lucas. Participating members include DJ Johnson, Tony Vedda, Teresa Eyet, and Matt McCormick.

d. Collaborative Discussion Follow-Up

The group agreed that Thursday's session included a constructive conversation, all part of a larger strategic vision for the future.

VII. Chairman's Report

Robert E. Thomas, IOM, CAE, CMP gave his Chairman's Report, which included the points below.

- Experience of traveling to all five sites and how each is unique in its own way.
 - He offered to share his thoughts on each sites' personality.
- 2016 final enrollment and 2017 attendance goals.
- Recognition and thank you to all volunteers, with special appreciation to the 2016 Boards of Regents Chairs.
- Possibility of having past board members serve as sounding board and test group for collaborate discussions.

VIII. Looking Ahead

Joseph B. Henning, IOM, CAE, ACE recognized and thanked Robert E. Thomas, IOM, CAE, CMP for his year of service as Board of Trustees Chairman. He also spoke about looking ahead to 2017.

IX. Other Business

The schedule for the remainder of the day was discussed.

X. Adjournment

The Board of Trustees were thanked for their participation and their time. It was reported that the next meeting will take place via webinar on Tuesday, February 7, 2017 at 11:30 a.m. EST and the next in-person meeting will take place on Friday, October 6, 2017 in D.C.

There being no other business the meeting was adjourned.



NOMINATIONS

2017 BOARD OF TRUSTEES

NEW TRUSTEE

Stephanie M. Parton, IOM, CAE
Director, Marketing Communications
Indiana CPA Society
Indianapolis, IN
Term: Through 2018 *as Chair of Winter Board of Regents*

ROTATING OFF

Blain Andera, IOM
Executive Director
Spirit Lake Chamber of Commerce
Spirit Lake, IA
Term: Through 2017 *as Chair of Winter Board of Regents*



NOMINATIONS

2017 CURRICULUM COMMITTEE

NEW MEMBER

Nick Kieffer, IOM, CP

Vice President

Goshen Chamber of Commerce

Goshen, IN

Term: Through 2018 as *Vice Chair of Winter Board of Regents*

ROTATING OFF COMMITTEE

Stephanie M. Parton, IOM, CAE

Director, Marketing Communications

Indiana CPA Society

Indianapolis, IN

Term: Through 2017 as *Vice Chair of Winter Board of Regents*



NOMINATIONS

2018 WINTER BOARD OF REGENTS

Chair

Stephanie M. Parton, IOM, CAE
Director, Marketing Communications
Indiana CPA Society
Indianapolis, IN
Term: 2017-2018

Vice Chair

Nick Kieffer, IOM, CP
Vice President, Business Development
Goshen Chamber of Commerce
Goshen, IN
Term: 2017-2018

Past Chair

Blain Andera, IOM
Executive Director
Spirit Lake Chamber of Commerce
Spirit Lake, IA
Term: 2017-2018

The following individuals are nominated:

Erin Carney, IOM
President
Metrocrest Chamber of Commerce
Carrollton, TX
Term: 2017-2019

Rodolfo P. Flores, IOM
Executive Director
Lincoln Square Ravenswood Chamber of Commerce
Chicago, IL
Term: 2017-2019

Brenda Gudex, IOM
Director of Agricultural Programs
Fond du Lac Area Association of Commerce
Fond du Lac, WI
Term: 2017-2019



NOMINATIONS

2018 WINTER BOARD OF REGENTS

Lynn Olberding, IOM
Executive Director
Marshalltown Area Chamber of Commerce
Marshalltown, IA
Term: 2017-2019

Term Renewals (two-year term):

Steven Baas, IOM
Vice President for Government Affairs
Metropolitan Milwaukee Association of Commerce
Milwaukee, WI
Term: 2015-2019

Steve Halter, IOM, EDFP, PCED
President
Greater Poplar Bluff Area Chamber of Commerce
Poplar Bluff, MO
Term: 2015-2019

REMAINING ON BOARD, NO ACTION REQUIRED

Kara Beer, IOM
President
Battle Creek Area Chamber of Commerce
Battle Creek, MI
Term: 2016-2018

Karri Clark, IOM
Director of Sales and Membership Operations
Bozeman Area Chamber of Commerce
Bozeman, MT
Term: 2016-2018

Mike Hofman, IOM
Executive Director
Orange City Chamber of Commerce
Orange City, IA
Term: 2016-2018

Rick Howe, IOM
Vice President
Jackson Hole Chamber of Commerce
Jackson, WY
Term: 2014-2018



NOMINATIONS

2018 WINTER BOARD OF REGENTS

William Lee, IOM
Chief Executive Officer
Gallup-McKinley County Chamber of Commerce
Gallup, NM
Term: 2014-2018

Douglas “Duffy” MacKay, IOM, N.D.
Senior Vice President, Scientific and Regulatory Affairs
Council for Responsible Nutrition
Washington, DC
Term: 2016-2018

Robert Medler, IOM
Vice President, Government Affairs
Tucson Metro Chamber
Tucson, AZ
Term: 2014-2018

Ed Stolmaker, IOM
President and CEO
Marana Chamber of Commerce
Marana, AZ
Term: 2012-2018

ROTATING OFF BOARD

Jack Lank, IOM
President and CEO
The United Regional Chamber of Commerce
Attleboro, MA
Term: 2010-2017



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

NOMINATIONS

2017 NORTHEAST BOARD OF REGENTS

ROTATING OFF

Joanne White, IOM

Executive Director

Greater West Plains Area Chamber of Commerce

West Plains, MO

Term: 2015-2017



PROGRAM UPDATES

MARKETING UPDATE

Institute's marketing efforts were advanced through the hard work and collaboration of volunteers and Institute staff. Below is an overview of our marketing accomplishments for your review. Our main aim was to create new messaging and outlets for promotion of the organization in addition to sustaining successful practices from past years.

Advertisements:

- Banner advertisements were sent to ASAE in November for placement at the top of their website. These banner ads include registration information and a list of the Institute summer sites, dates, and locations. Ads link back to institute.uschamber.com/register.
- *Chamber Executive* magazine has been an important medium for us to advertise Institute testimonials and upcoming registration dates. Multiple half-page and full-page ads have been placed in the magazine.
- Our "scholarship stuffer" postcard was updated with the new 2017 summer sites and 2018 Winter dates, and this postcard was placed in the post-site thank you letters sent to Institute attendees.
- The Institute planner is our largest and most prominent advertisement and is distributed to all Institute attendees at site registration and is also included in conference shipments all around the country this summer. This planner contains a calendar that people use all throughout the year and is a "walking advertisement."

Promotional Materials:

- Institute will continue to send blue tablecloths with our logo and hashtag to different conferences, such as MAKO and ACCE. These bright, eye-catching pieces are easy to transport and they also market our social media presence.
- The blue water bottles given to attendees with their planner during Winter Institute registration were very well received.
- Institute screen cleaners continue to be a valuable marketing tool featuring both association and chamber testimonials. They are high-quality, unique items, and printing them in full-color makes them an attractive collateral piece.

Further Marketing:

- Institute video testimonials were well-received on social media. These short, selfie-style video clips featured past Institute attendees explaining what they believe to be the best benefits of Institute. We plan to continue these videos each month this year.
- The classroom photo contests have now been held for each Institute site. This is a great way to receive authentic photos, from the perspective of attendees, for marketing use.



PROGRAM UPDATES

SOCIAL MEDIA UPDATE

	2016*	2017*	Percentage Increase
Facebook	2,197 Likes	2,539 Likes	16%
Twitter	1,431 Followers	1,641 Followers	15%
LinkedIn	2,076 Members	2,265 Members	9%
Instagram	178 Followers	303 Followers	70%

*Numbers as of January 25

On-site Social Media 2017

Winter Institute

216 Attendees
Tucson, Arizona
January 4-8



796

Engaged users on Facebook
vs. 546 in 2016



57

#IOMeducates Tweets
vs. 95 in 2016



65

#IOMeducates
Instagram Posts
vs. 26 in 2016



26

New Likes
vs. 14 in 2016



31,365

Weekly Total Facebook Reach=
vs. 19,666 in 2016



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

PROGRAM UPDATES

STATE PARTNERSHIPS

PROGRAM NAME CHANGE

In 2017 Institute renamed the *Pay It Forward* program to the *State Partner Scholarship (SPS)*. Staff has reached out to state societies to update them on the name change and to announce the 2017 SPS schedule. The only aspect of the partnership that has changed is the name of the program. Institute will continue to offer each state society four scholarships (two to Winter Institute and two to the summer sites) to award in exchange for marketing the Institute program.



PROGRAM UPDATES

SCHOLARSHIP UPDATE

2015	Winter	Midwest	Southeast	West	Northeast	Total
Funds remaining from previous year's scholarship allocation	\$1,412.00	\$895.00	\$0.00	\$0.00	\$960.00	\$3,267.00
Silent auction	\$5,727.00	\$3,973.00	\$7,666.00	\$8,600.00	\$4,723.00	\$30,689.00
Pre-scholarship deadline online donations	\$75.00	\$100.00	\$200.00	\$25.00	\$50.00	\$450.00
Post-scholarship deadline online donations	NA	\$996.00	\$0.00	\$0.00	\$200.00	\$1,196.00
Additional on-site fundraising	\$505.00	\$0.00	\$0.00	\$0.00	\$0.00	\$505.00
Annual appeal (mailing)	NA	NA	NA	NA	NA	NA
Bi-annual solicitation	NA	NA	NA	NA	NA	NA
#GivingTuesday	NA	\$208.00	\$153.00	\$138.00	\$8.00	\$507.00
Online store	NA	NA	NA	NA	NA	NA
Total to allocate to 2015 sites:	\$7,719.00	\$6,172.00	\$8,019.00	\$8,763.00	\$5,941.00	\$36,614.00
2016	Winter	Midwest	Southeast	West	Northeast	Total
Funds remaining from previous year's scholarship allocation	\$500.00	\$100.00	\$0.00	\$1,177.00	\$0.00	\$1,777.00
Silent auction	\$6,365.00	\$3,930.00	\$6,479.00	\$10,370.00	\$3,906.00	\$31,050.00
Pre-scholarship deadline online donations	\$125.00	\$0.00	\$0.00	\$0.00	\$0.00	\$125.00
Post-scholarship deadline online donations	\$50.00	\$0.00	\$0.00	\$50.00	\$150.00	\$250.00
Additional on-site fundraising	\$1,281.00	\$2,700.00	\$1,200.00	\$0.00	\$812.00	\$5,993.00
Annual appeal (mailing)	\$270.00	\$170.00	\$270.00	\$220.00	\$420.00	\$1,350.00
Bi-annual solicitation	\$2.00	\$197.00	\$2.00	\$102.00	\$107.00	\$410.00
#GivingTuesday	\$53.00	\$452.00	\$312.00	\$737.00	\$287.00	\$1,841.00
Online store	\$96.61	\$188.97	\$188.97	\$188.97	\$188.97	\$852.49
Total to allocate to 2016 sites:	\$8,742.61	\$7,737.97	\$8,451.97	\$12,844.97	\$5,870.97	\$43,648.49
2017	Winter	Midwest	Southeast	West	Northeast	Total
Funds remaining from previous year's scholarship allocation	\$0.00	\$0.00	\$0.00	\$349.97	\$370.97	\$720.94
Silent auction	\$7,569.00	\$3,256.00	\$5,738.47	\$9,582.46	\$3,863.88	\$30,009.81
2016 Registration donations	\$0.00	\$75.00	\$35.00	\$50.00	\$225.00	\$385.00
Additional on-site fundraising	\$1,332.00	\$588.00	\$1,382.00	\$0.00	\$740.00	\$4,042.00
Terri Ferraguto Memorial Scholarship	\$0.00	\$0.00	\$958.77	\$0.00	\$0.00	\$958.77
Annual appeal (mailing)	\$150.00	\$375.00	\$500.00	\$65.00	\$600.00	\$1,690.00
Bi-annual solicitation	\$5.00	\$30.00	\$30.00	\$5.00	\$105.00	\$175.00
#GivingTuesday	\$382.00	\$655.00	\$540.00	\$765.00	\$405.00	\$2,747.00
Online store	\$190.76	\$98.40	\$98.38	\$98.38	\$98.38	\$584.30
\$1,000 gift from IOM	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$5,000.00
Total to allocate to 2017 sites:	\$10,628.76	\$6,077.40	\$10,282.62	\$11,915.81	\$7,408.23	\$46,312.82
2018	Winter	Midwest	Southeast	West	Northeast	Total
Funds remaining from previous year's scholarship allocation	\$0.00					
Silent auction	\$5,464.70					\$5,464.70
2017 Registration donations	\$210.00					\$210.00
Additional on-site fundraising	\$2,702.80					\$2,702.80
Annual appeal (mailing)						
Bi-annual solicitation						
#GivingTuesday	\$635.00					\$635.00
Online store						
\$1,000 gift from IOM	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$5,000.00
Total to allocate to 2018 sites:	\$10,012.50					



PROGRAM UPDATES

FUNDRAISING PLAN

Part 1: *Assets*

- Engaged alumni.
- Impassioned boards with ever-growing spheres of influence.
- Industry recognition and status.
- Database of over 5,000 contacts.
- Strong relationships with state societies.

Part 2: *Results of 2016 Goals*

- Raise \$45,000 through various fundraising avenues.
 - Raised just over \$40,000.
- 100% participation from board.
 - In 2016, 72% of Regents and Trustees donated to Institute’s fundraising efforts. These donations have come through all fundraising avenues.

Strategy	Description	Target Audience	Fundraising Goal	Anticipated Cost	Amount Raised	Cost to Program	Led By	Deadline
Bi-Annual Solicitation	Twice a year email communication	Current attendees and alumni	\$1,000	Staff time	\$175	Staff time	Staff	March 2016 & August 2016
Annual Appeal (mailing)	Letter from Trustees Chairman	Alumni	\$3,000	\$1,600	\$1,690	\$991	Trustees Chairman and Staff	April 2016
On-Site Fundraising	Silent Auction, Hearts, Stars, Etc.	Current attendees	\$35,000	Staff time	\$35,011	Staff time	Attendees and Boards of Regents	Site dependent
#GivingTuesday	#GivingTuesday email and social media	Current attendees and alumni	\$2,000	Staff time	\$3,000	Staff time	Staff	November 29, 2016
Board Expectations	100% participation from all BORs and BOT	Alumni	Included in above goals	NA	Including in other Fundraising Avenues	Staff time	Boards of Regents and Board of Trustees	Ongoing

Part 3: *2017 Goals*

- Raise \$45,000.
- Increase donor participation amongst alumni/non Board members.

Part 4: *2017 Plan of Action*

Strategy	Description	Target Audience	Fundraising Goal	Anticipated Cost	Led By	Deadline
Bi-Annual Solicitation	Twice a year email communication	Current attendees and alumni	\$500	Staff time	Staff	March 2017 & October 2017
Annual Appeal (mailing)	Letter from Trustees Chairman	Alumni	\$2,000	\$1,000	Trustees Chairman and Staff	April 2017
On-Site Fundraising	Silent Auction, Hearts, Stars, Etc.	Current attendees	\$33,000	Staff time	Attendees and Boards of Regents	Site dependent
#GivingTuesday	#GivingTuesday email and social media	Current attendees and alumni	\$3,500	Staff time	Staff	November 28, 2017
Board Expectations	100% participation from all BORs and BOT	Alumni	Included in above goals	NA	Boards of Regents and Board of Trustees	Ongoing

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



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

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



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

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



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

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

BOARD OF REGENTS REPORT



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

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



DEMOGRAPHICS

AN OVERVIEW OF THE 2016 SUMMER AND 2017 WINTER DEMOGRAPHICS BY SITE

Class Level	Midwest 2016	Southeast 2016	West 2016	Northeast 2016	Winter 2017
	1st year	32.14%	29.51%	25.64%	33.33%
2nd year	28.57%	30.33%	29.06%	29.70%	26.85%
3rd year	20.71%	20.49%	27.35%	17.58%	26.39%
4th year	18.57%	19.75%	17.95%	19.39%	16.20%

Employer	Midwest 2016	Southeast 2016	West 2016	Northeast 2016	Winter 2017
	Association	27.14%	9.02%	19.66%	42.21%
Chamber	65.00%	88.52%	75.36%	52.12%	63.43%
Other	7.86%	2.46%	5.98%	6.67%	7.41%

Age	Midwest 2016	Southeast 2016	West 2016	Northeast 2016	Winter 2017
	21 – 30	18.57%	19.67%	15.38%	18.18%
31 – 40	33.57%	36.07%	32.48%	31.52%	32.41%
41 – 50	27.14%	23.77%	33.33%	32.12%	28.70%
51 +	20.71%	20.49%	18.80%	18.18%	26.39%

Gender	Midwest 2016	Southeast 2016	West 2016	Northeast 2016	Winter 2017
	Male	35.00%	19.67%	29.06%	27.88%
Female	65.00%	80.33%	70.94%	72.12%	72.22%

Ethnicity*	Midwest 2016	Southeast 2016	West 2016	Northeast 2016	Winter 2017
	*Question not required (answers may not total 100%)				
Caucasian	90.71%	93.70%	78.95%	87.34%	88.04%
Other Ethnicity	5.71%	6.30%	21.05%	12.66%	11.96%

Years of Experience in Association/Chamber Field	Midwest 2016	Southeast 2016	West 2016	Northeast 2016	Winter 2017
	Less than 2 years	10.00%	13.52%	7.69%	29.70%
2 to 5 years	32.14%	36.07%	35.04%	23.64%	32.87%
6 to 10 years	22.14%	28.69%	26.50%	6.67%	27.31%
More than 10 years	35.71%	21.72%	30.77%	40.00%	31.48%



DEMOGRAPHICS

AN OVERVIEW OF THE 2016 SUMMER AND 2017 WINTER DEMOGRAPHICS BY SITE

How Did You Learn About Institute?*					
*Attendees had opportunity to choose more than one option	Midwest 2016	Southeast 2016	West 2016	Northeast 2016	Winter 2017
Employer	54.29%	69.67%	61.54%	54.55%	56.48%
Colleague	32.14%	18.44%	23.93%	30.91%	30.09%
State Conference	11.43%	5.33%	6.84%	3.64%	8.80%
Direct Mail	0.71%	0.41%	0.00%	0.61%	0.00%
Email	0.67%	0.82%	0.00%	1.82%	0.46%
Website	0.71%	1.64%	3.42%	2.42%	1.85%
Other	0.00%	3.69%	4.27%	6.06%	2.31%

Organization's Budget Size (excluding Public Funds)					
	Midwest 2016	Southeast 2016	West 2016	Northeast 2016	Winter 2017
Less than \$100,000	3.57%	3.28%	3.42%	4.85%	5.56%
\$100,001 - \$250,000	12.14%	18.03%	7.69%	13.94%	18.06%
\$250,001 - \$500,000	22.14%	22.95%	17.09%	14.55%	20.83%
\$500,001 - \$1,000,000	16.43%	22.13%	22.22%	14.55%	12.50%
\$1,000,001 - \$3,000,000	19.29%	13.11%	27.35%	17.58%	19.91%
\$3,000,001 - \$5,000,000	5.71%	9.43%	10.26%	7.27%	6.02%
\$5,000,001 - \$10,000,000	8.57%	6.97%	4.27%	11.52%	9.26%
Greater than \$10,000,001	12.14%	4.10%	7.69%	15.76%	7.87%

Organization's Staff Size					
	Midwest 2016	Southeast 2016	West 2016	Northeast 2016	Winter 2017
Less than 3	10.00%	18.44%	9.40%	13.94%	19.91%
3 to 10	50.00%	50.41%	45.30%	41.21%	41.67%
11 to 25	17.14%	14.75%	31.62%	15.15%	20.83%
26 to 50	10.00%	10.66%	6.84%	8.48%	5.09%
51 to 100	7.86%	2.87%	4.27%	11.52%	5.09%
More than 100	5.00%	2.87%	1.60%	9.70%	7.41%

Level of Responsibility					
	Midwest 2016	Southeast 2016	West 2016	Northeast 2016	Winter 2017
CEO / Executive Director	29.29%	34.84%	29.06%	35.76%	40.28%
Senior Executive / Department Director	30.00%	33.61%	42.74%	34.55%	38.89%
Manager	29.29%	19.26%	19.66%	13.21%	13.43%
Coordinator / Assistant	11.43%	12.30%	8.55%	8.48%	7.41%



DEMOGRAPHICS

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

AN OVERVIEW OF THE 2016 SUMMER AND 2017 WINTER DEMOGRAPHICS BY SITE

Primary Job Responsibility	Midwest 2016	Southeast 2016	West 2016	Northeast 2016	Winter 2017
	Membership	19.29%	18.85%	13.68%	13.94%
General Management	35.00%	38.93%	34.19%	47.27%	51.85%
Marketing	12.14%	11.48%	16.24%	11.52%	8.33%
Finance	5.00%	4.10%	5.13%	3.03%	2.78%
Economic Development	4.29%	4.10%	3.42%	1.82%	2.78%
Government Relations	7.14%	2.87%	4.27%	10.30%	3.24%
Other	17.14%	19.67%	23.08%	12.12%	15.74%

2017 Winter Institute Attendees





DEMOGRAPHICS

2017 WINTER INSTITUTE ATTENDEE STATE BREAKDOWN

2017 Winter Institute

216 Attendees from 40 states, the District of Columbia, and Ethiopia

State, Number of Attendees, %

Alaska,	7,	3.24%	Missouri,	15,	6.94%
Arizona,	14,	6.48%	Nebraska,	1,	0.46%
Arkansas,	7,	3.24%	Nevada,	1,	0.46%
California,	4,	1.85%	New Mexico,	4,	1.85%
Colorado,	1,	0.46%	New York,	1,	0.46%
Connecticut,	1,	0.46%	North Carolina,	1,	0.46%
Delaware,	1,	0.46%	Ohio,	5,	2.31%
Florida,	1,	0.46%	Oklahoma,	12,	5.56%
Idaho,	6,	2.78%	Oregon,	3,	1.39%
Illinois,	7,	3.24%	Pennsylvania,	1,	0.46%
Indiana,	8,	3.70%	South Carolina,	1,	0.46%
Iowa,	6,	2.78%	South Dakota,	1,	0.46%
Kansas,	4,	1.85%	Tennessee,	4,	1.85%
Kentucky,	2,	0.93%	Texas,	22,	10.19%
Maine,	1,	0.46%	Utah,	2,	0.93%
Maryland,	1,	0.46%	Virginia,	12,	5.56%
Massachusetts,	2,	0.93%	Washington,	6,	2.78%
Michigan,	6,	2.78%	Washington, DC,	20,	9.26%
Minnesota,	7,	3.24%	Wisconsin,	3,	1.39%
Mississippi,	4,	1.85%	Wyoming,	9,	4.17%
			Ethiopia,	2,	0.93%

Most Attendees in 2017, Texas with 22

Most Attendees in 2016, Texas with 28

Top Increase since 2016:

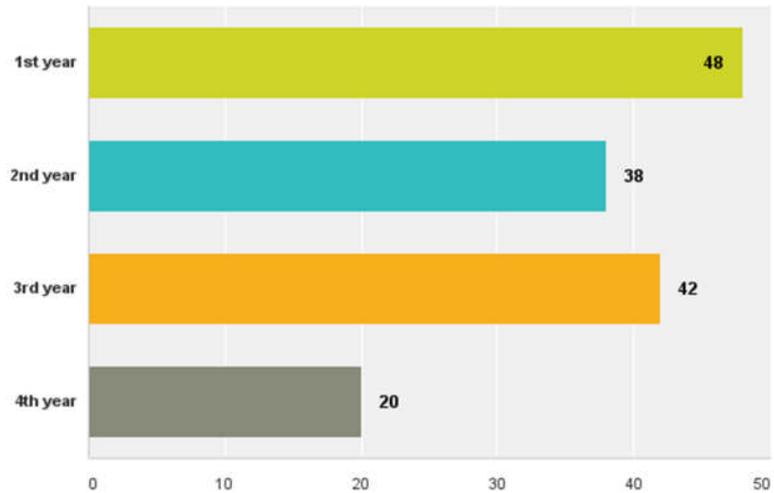
Missouri +5



ATTENDEE SURVEY RESULTS AND FEEDBACK

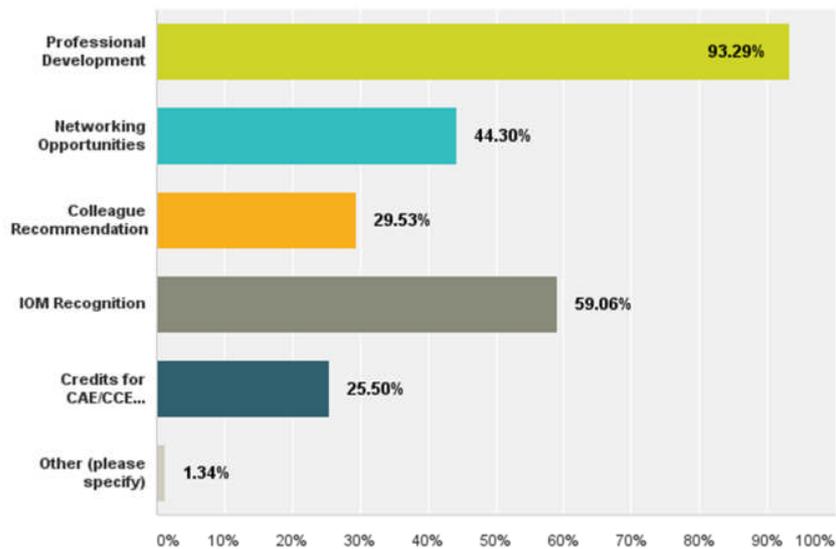
Q1 Your class level:

Answered: 148 Skipped: 1



Q2 What was the key factor(s) in your decision to attend Institute? Check all that apply:

Answered: 149 Skipped: 0

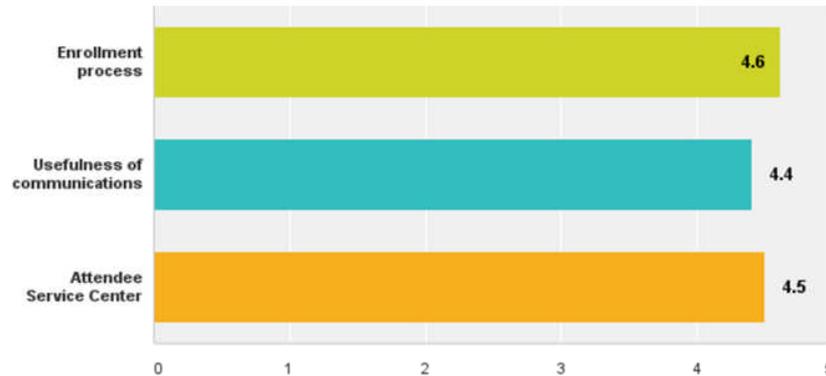




ATTENDEE SURVEY RESULTS AND FEEDBACK

Q3 Registration and Communication (with 1 being poor and 5 being excellent)

Answered: 150 Skipped: 2



Q4: Additional comments about registration and communication*:

- Love the online resources and materials to download.
- Registration was down when I registered and had to do it again, but that's a fluke and only reason I rated it low. I don't think attendee service center ever uploaded the class list which I was looking for, which is why I ranked that low. (It said coming soon.)
- It didn't seem like we got as much information prior to attending this year. Several of my class commented that we didn't get additional communication about the silent auction and talent show.
- I was a member of the US Chamber but my enrollment form wouldn't allow me to select it for the discounted tuition option. I understand that I could have called in to have that physically changed, but did not and paid the full amount. It would be nice if that were easier to change and verify online in the future.
- In the holiday season, it is a challenge to keep up with e-mail. Some of the Institute's emails were quite long. It might be better to break them up into shorter emails with clear calls to action when necessary.
- Communications could have contained more detail. Also, it would be helpful if you could easily access your class schedule and look at past classes taken on the website.
- There were a lot of emails over the holiday and just prior to Institute from multiple people. It was a little hard to sort through what I needed to do and who I needed to communicate with.
- At enrollment, I received a confirmation, but then nothing until just before the class started.
- The welcome center had good information related to your schedule and handouts. There was no attendee list/directory this year. Last year, a spreadsheet was provided. This year, it was only on the app, so I could not sort and search by org name.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I could never find a way to change my password to something I'd remember on the Attendee Service Center, so each time I signed in on a difference device, I would have to choose "forgot password," which resets it to something random and un-remember-able. So, it should be easier to reset your own password. But other than that, it was good to have.
- Not a fan of apps.
- Prior notification of class outline and items to review before class was outstanding and a terrific advantage.
- Several of the professors didn't have notes in the online portal prior to the event, which wasn't helpful in preparing. But most of them did email them later, which is nice!
- It would be helpful when signing up for electives to know which electives I have taken in previous years.
- Attendee service center navigation can be challenging, information may be better organized for better customer service.
- It would be helpful if we were able to see which classes we have taken in the past without having to research our notes from last year.
- When signing up for elective classes, it would be helpful to know who is teaching each class. I ended up taking two classes that covered many of the same points taught by the same instructor.
- Way too many e-mails. Was getting multiple e-mails from IOM, class adviser (which would start responses from classmates). Wore me out before I even got to Institute. Please stop sending so many e-mails.
- I barely heard from my class adviser prior to the first homeroom. The only time she contacted our class was to tell us that she was planning the class dinner and told us where we were eating. No other communication from her at all. The emails from IOM itself were informative.
- Keep emails short and sweet.
- Everything from prep to end have been excellent. Keep it up.
- Consider removing already taken electives from the options when registering for classes, would eliminate the need to request transcripts.
- There probably is a place where you can see your class list, but I could not locate it.
- It would have been nice to have some sort of communication on if classes would not have handouts ahead of time. I kept going in and checking while on Christmas vacation to see if I needed to go into my office to print of documents before flying down.
- Class advisors need to make communications shorter and more to the point.
- A string bag would be nice to carry materials, water bottle.
- I am not sure if I overlooked it but it would be nice to have a history of past courses available at the click of a button so it is easier to pick electives.
- Love the IOM app! So helpful!
- Schedules could be clearer about who attends what. Any chance for a unified schedule that matches classes with other required activities?

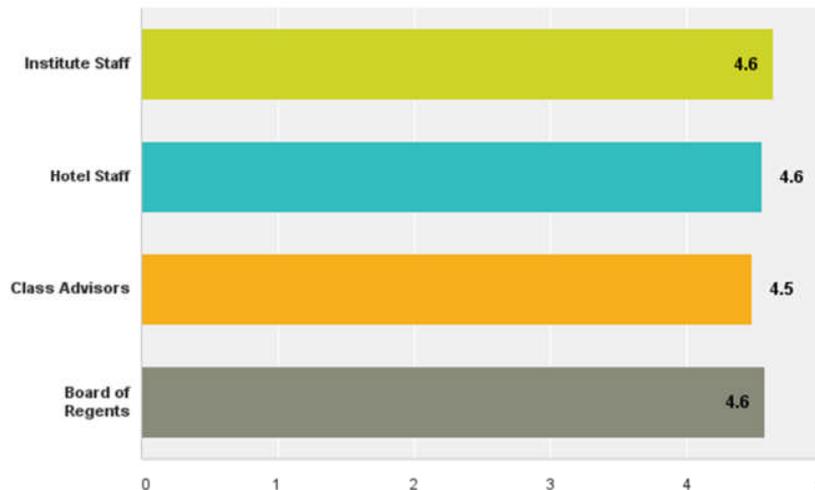


WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

Q5 Customer Service

Answered: 149 Skipped: 3



Q6: Additional comments about customer service*:

- I felt that the Institute Staff and the Board of Regents were much more standoffish with their approach to interacting with the classes this year than in previous years.
- Our class adviser for 2-2 was not really engaged or seemed to want to connect with the 2-2 students.
- *Name removed* was so energetic as our advisor. Made all the difference.
- My class advisor was at times over the top. I believe a more professional attitude would be more appropriate for Institute.
- I have had three great class advisors at Institute! Thank you!
- Though I am loathe to admit it, we received a rather cold reception from *name removed*, our class advisor. At no time could I understand the animosity she seemed to harbor for our class. Sadly, it set a rather grim tone for Institute this year. To think of all the money our organizations spend on Institute, and on travel, and on hotel rooms...to then have our own class advisor treat us shabbily...is rather difficult to stomach.
- We had a fabulous class advisor. I know the process is to rotate class advisors, but given our evident chemistry, I'd prefer to keep him with our class for the next two years.
- The hotel staff were absolutely amazing. They went above and beyond to make sure I had what I needed.
- The energy and passion from everyone involved, including 2nd-4th yr people, was great. Very welcoming, encouraging, informative, etc.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Everyone seemed very willing to help out. Everyone was also welcoming and always had a smile on their face!
- Our Class Adviser was great and always got us answers right away for any questions we had that he did not know the response to.
- Our class advisor was not engaged. This person came across rough, closed off, and aggressive, causing the class to not want to interact with our class advisor.
- Our class advisor seemed to not want to be there. Didn't take the time to bond with us and left early without saying good bye.
- The availability to change courses was a great asset.
- *Name removed* was a GREAT advisor!
- While we normally have an informative Class Advisor this year we did not receive a class list to review who would be joining us. I also felt like she was a bit preoccupied in class on her phone for the majority of our classes.
- Thank you for all you do! Also, can't say enough about the hotel staff - they rock!
- Staff should have communicated request for only 4th years on 1st bus for big bash. Kicking other attendees off and the manner in which it was done was unnecessary. Class advisors should treat attendees professionally and courteously, not as children in a classroom.
- Instructors were excellent, however I didn't find the institute staff to be friendly at all (no interactions with the students and when there were they were not friendly). Staff should be the ones setting the example.
- Our class advisor was great. He interacted with our group a lot outside of the classroom which made the entire experience more comfortable.
- The rating I have is for Class 2-1 class advisor *name removed*. He was excellent!
- *Name removed* was awesome!
- I was not happy with our Class Advisor. Every time you would ask her a question she would be offended and would not have the answer. She acted like she didn't want to be there or get to know us. When asked by a board of regent how she was doing I tried to share how I felt and was told to share is with a member of my class and this was not the place to talk about. If it was not the place to talk about it why did they ask how it was going.
- I only score Institute staff and Board of Regents low because I don't know what service they were supposed to be providing. If they provided a service, I wasn't aware.
- Class advisor didn't really keep us informed. And if we asked a question, she would tell us to check our app. We only met our class regent for about 2 minutes total and I don't think she even told us her name. All of the other regents were great. Institute staff was very friendly as well as the hotel staff.
- The first year we were greeted in the morning by a large group of people in the morning. Each year it has declined. Are we not valued?
- Excellent.
- Our class advisor would have benefited from a refresher course on Customer Service from David K. Aaker. I think she was well-intentioned, but not polished. We were treated like children, not like professional adults.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

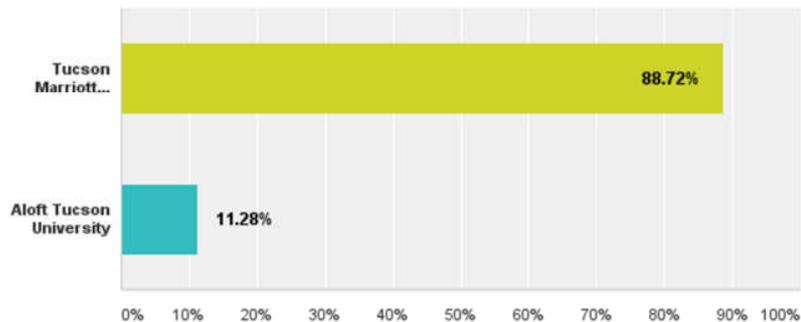
- The Regent assigned to my class was only seen for about thirty seconds (on day two) and didn't even know the class advisor's name. The majority of the Regents were very student focused, helpful and knowledgeable.
- Having *name removed* in my class was extremely helpful for all of us. We always had the correct information.
- I still have no idea what the members of the Board of Regents do other than stand in the hallway and laugh with each other.
- Lots of friendly faces and eager to help.
- I had a great class advisor. All of mine have been great.
- There is a total disconnect with the board and the students.
- My class had limited interaction; I don't think saying good morning as a group/Board of Regents, each morning, really counts as interaction.
- The Board of Regents needs to review within themselves why they are serving, on the board. Are their ego's in the way of the program?
- Maybe, they need to interact with the classes and institute members vs. only come into class to reprimand, scold and lecture a class.
- I had no conversations with any of the Institute staff.
- Our class advisor was very disengaged from our class. She did provide the obligatory information each day, but wasn't much of a mentor or motivator for the class.
- Our class advisor wasn't tip-top.
- No complaints!
- Everyone was very helpful.
- *Name removed* rocked!
- Thank you *name removed* for being such a great Class Advisor!
- My advisor was very nice; however, I think she needed coaching and was not motivating or never addressed our class about anything else, no group picture, nothing about the bonding that can take place, which we handled on our own, but it was almost like we did not have an advisor at all.
- Everyone was nice, welcoming, and helpful. My biggest dissatisfaction was actually in being made to feel bad on several occasions for driving myself to graduation instead of riding the bus. I was staying with family and am also pregnant. The bus ride would have doubled the time it took me to get to the resort and back home. I wasn't able to drink so driving under the influence wasn't an issue. But one person refused to tell me what ballroom we were in because I should just ride the bus. Even my classmates were commenting how ridiculous the responses I was getting were.
- The Board of Regents seem very disconnected from the group. Because of that, I feel like there was lots of talk among attendees about their purpose and qualifications. Overall, they seemed very unfriendly. Our class raised over \$500 for the scholarship fund and the regents came by our class and didn't even mention it. They only wanted to introduce themselves and tell us about their background. It seems as if the regents, as a whole, do this as a status thing, and not as a service to the attendees of Institute.



ATTENDEE SURVEY RESULTS AND FEEDBACK

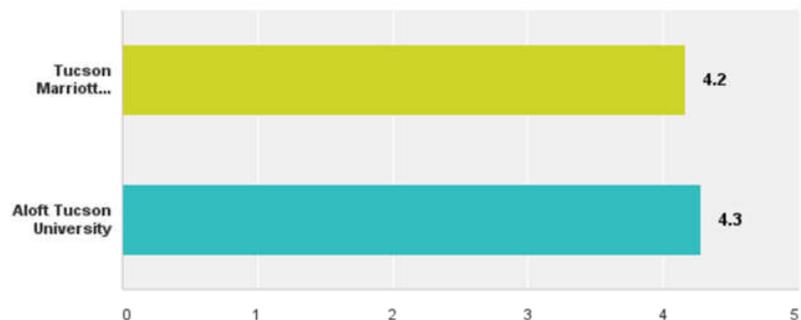
Q7 Which hotel did you choose to stay at?

Answered: 133 Skipped: 18



Q8 How would you rate your accommodations?

Answered: 141 Skipped: 11



Q9: Additional comments about accommodations*:

- Wish there was a fridge in the room to keep cold food.
- Only complaints were that there was nowhere to put away my clothes other than a few hangers, so I had to lay them all out on one side of the bed, chairs, desk, etc.
- Elevator was very slow. And with the open concept for the lobby, it can be very loud in your room.
- Fair but security improvement required.
- I appreciate that they had wifi for our group!
- While I should have checked in advance, there was no refrigerator in the room, which has become a basic expectation for my business travel.
- Challenges address with hotel with reservations and facility.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Love Aloft!
- It was a good hotel with helpful staff. However, it was very loud at night when you were trying to sleep.
- Great job with the elevators!
- Hotel seems to be getting a little worn out. Staff was exceptional in my experience.
- I enjoyed the central location, but the showers in the bathrooms were unpleasant (too much or too little pressure). At times when there was too much pressure water would go all over the bathroom. Also the price keeps increasing each year and there have not been any improvements to the hotel.
- Worst Marriott on the planet. So loud with noise from the bar/restaurant/foyer that it's almost laughable (I was on the 8th floor!). Room service is inconsistent and I asked them to tend to my room when I was going to be out, they said no problem then never touched it. In my third year, this Marriott has been consistently terrible and uncomfortable. Does not help make for a good week.
- Everything was great at the hotel. Staff was friendly. Room was clean. Great service.
- I enjoyed it.
- The Marriott is in desperate need of a renovation. The stains on the carpet and furniture, the cracked tiles in the bathroom, the uncomfortable and well-worn bed makes it an undesirable hotel. I don't expect to stay there again.
- I wasn't affected but I heard some did not have hot water on Saturday.
- The Marriott staff is fantastic and I've always taken advantage of the concierge breakfast, which was great. Only thing that has happened every year is that the water isn't always hot while taking a shower. And I got skipped twice on getting my room cleaned.
- Elevator is a little of a hassle.
- I think it's really nice of them to offer a refreshment when we get back from class, this is great customer service.
- There was some confusion on the bus service. This could have been made a lot clearer with communications to the hotel staff about where the bus was picking up and dropping off and its schedule. The bus driver was very accommodating; hotel staff did not know anything.
- For the last 2 years when I check in they assign me to a room that is already occupied. Often did not have hot water.
- Hotel staff was very welcoming to the Institute crew; it was nice of them to offer treats and snacks in the lobby as we came and went.
- It's noisy, but very accommodating. Breakfast too expensive to take advantage of every day.
- Friendly staff. Very convenient to campus and after hour activities.
- Great location.
- I'd rate the hotel higher but the elevator situation at that hotel is sub-par at best.
- Food was expensive, but probably would be everywhere I suppose.
- Felt the food and beverage pricing was a little too high.



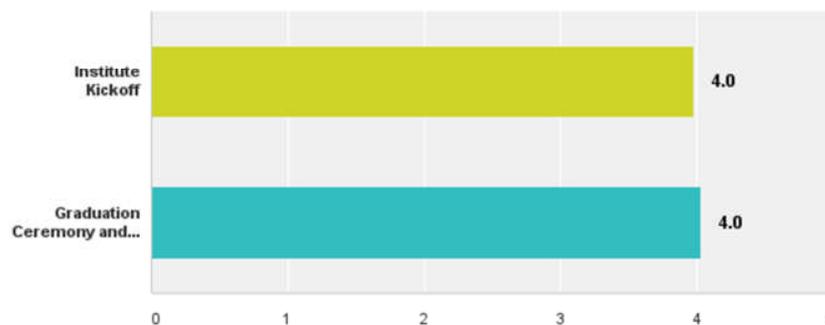
WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I say this every year, but I don't see it changing. That hotel, although the staff is nice, is a very rundown Marriott. It needs to be renovated **DESPERATELY**. As a Marriott rewards member and loyal customer, visually, it's the worst I've ever stayed in.
- No hot water at hotel one morning.

Q10 Please rate your experience at the following Institute events.

Answered: 150 Skipped: 2



Q11: Additional comments about events*:

- I liked previous years when Institute Kickoff had a theme and people dressed for the theme. I did like the networking game this year and the gift cards.
- The graduation ceremony/picture part seemed to take much longer than last year's graduation. Our class wanted the photographer to take a class pic, but by the time there was some room on stage, the photographer was packing up her equipment and left.
- Food at Big Bash was not that great.
- The venue was great but the food service could have been a little more organized (steak knives coming out 20 minutes after food). The steak was definitely not tender.
- Graduation: I wish they would have started serving dinner sooner. I think the length of graduation is what caused people to bail as soon as it was over instead of staying for dancing, which was too bad.
- The events are great but it seems like the same old thing with the kick off. The food at the Bash was hit or miss - several at my table didn't eat because the meat was under or overcooked. It was also really hard to see the podium during the Bash - seemed like extra lighting had been forgotten or not included in this year's budget.
- There were several comments about the stage being set near the service entrance.
- Salads should have been served during speeches and graduate ceremony.
- The kickoff was fun. I thought all of the introductions were tedious, but I am not sure how else to accomplish the same task more quickly.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I had a BLAST dancing at the big bash, but I think it took too long to get the dancing. Preset salads on the tables would help expedite dinner service. Also, for the graduation ceremony, the names should be called more quickly, with photos taking place after they've crossed the stage so it can move along at a nice clip. A good event is like a good rodeo -- no downtime.
- Food was bad.
- It would be nice if the room didn't empty out right after graduation. I'm not sure how to combat that, though.
- Dinner seemed really late at graduation. Might have pre-set salads.
- I appreciate all of the work it took from staff and volunteers to pull off both Institute and the special events around Institute. Great job!
- Food was terrible and it was terrible last year!
- First year in Tucson- I liked that the speaking and the meal/networking happened at one location. I prefer this than the setup at Madison I think. The ceremony and location was wonderful for the graduation. The food was poor for what I'm assuming IOM paid and lower quality than expected at such a nice location.
- The food has been the same at the big bash for the last three years and is not very good. A little change up in the event or presentation would be nice, a little boring after three years of the same.
- Long days so those events make them longer especially if having to travel.
- I really enjoyed combining the welcome introductions to the Kick Off event. Really gave us a reason to attend and be engaged.
- The steak was over cooked.
- I like the brevity of the kickoff. Gave me a chance to grab a bite, chat a little with peers and get to bed since traveling is exhausting.
- There was not enough time given to get to know new people. I like the idea of getting signatures from different classes but there were few people that took the time to get to know each other during this activity.
- Since this is my third year I have been able to experience two other kickoffs. There were no activities or events to encourage interactions (besides from getting signatures). I would highly encourage going back to a themed party with the food to match party theme. Regarding the graduation do not hold off food service until after the ceremony. We were not eating until 8:30 and with the first bus departing at 8:45pm this left no time to enjoy dinner.
- The Big Bash - I would recommend that you hand out drink tickets at the event, not at registration. Many people in my group forgot them at the hotel and ended up paying for drinks on their own.
- The food was not very good at the Graduation Ceremony.
- The backdrop of the stage along with the location of the stage could have been better. The Institute logo would have been a nice background and the stage could have been placed differently.
- Need to move the stage under the Institute Lighted wall sign---think that would be better to not get distracted by wait staff serving behind stage currently. Otherwise fabulous event.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- The kickoff was a little disappointing. In years past, it was a big deal with the recognition of the graduating classes and, when starting, Class 1 was always in the back. I couldn't wait until I was 4 and then, nothing. The mixer idea was great but feel that prizes should have been awarded to each individual classes to "spread the love." The big bash was great and the only comment was the meal was not good. My steak was hard to cut, chew and tough. All at our table thought so. Other than that, it was exciting!
- I must continue to protest this ridiculous food service. Supper time is 6 p.m., not 8 p.m. or 8:15 p.m. At least this year, I heard many people complain about this so I know I'm not crazy. It's been a long, long day. We're hungry. If we need to have a cocktail hour, it should be at 5 p.m. Serve supper at 6 p.m. and graduation can take place while we're eating. I also heard many ask that same question, "Why can't we eat while they are graduating?" That way those who want to go home early can.
- This year food was served at 8 p.m. and the first bus ran at 8:30 p.m. I had people at my table just take a couple of bites and leave.
- I won't even go into how amazingly awful the food was because I'm sure that will be a consistent complaint from others. However, I would suggest that maybe the waiting and the food setting that long contributes to it's problems, although what they called a "steak" was simply a steak-based cut. I don't know what animal it came from or what part of the body but it was odd, to say the least. I had a person next to me get served what they called "chicken." Everyone at my table, including the person who got served this white chunk of rubber, stared at it quietly until she just pushed it away and left to go to the bus.
- Regarding the bus service, an hour between? If I miss the 8:30 p.m. bus, I'm stuck for an hour with two buses sitting at the door? I was very confused by this. 30 minutes in between, I can see. But an hour?
- Finally, is it really a Bash? For 3 years, I've watched handfuls of people awkwardly dancing and listened in groups to most people there staying to use of their drink tickets and making plans for where to go after the "Bash." This year, I noticed more people asking why not just have a nice meal and grad ceremony at the college and turn people loose. I don't think this minimizes the pomp and circumstance of graduation. It can still be nice and ceremonial. But it should be edited down a bunch.
- One last thing. Each class should have 1 speaker. 1. Not 2. Not "we had a tie." 1 speaker each. Hold them to the 10 minutes. Every year, we've been subjected to the long-winded one and nobody facilitates the speech-making and gives them the signal to wrap it up.
- Steaks at Big Bash were terrible. Program was excellent as well as all of the other food provided.
- The events seemed to end very quickly. Maybe do the change in class times.
- Quite interesting and memorable.
- Food at Big Bash was terrible. I think you could save the \$ of transportation and upgrade an event at the Marriott near university. Since it was dark, we couldn't appreciate the views etc at the JW.
- The food at the graduation ceremony was really really poor. I do events, so understand that keeping everyone happy with food is a challenge. But I saw many people with only 1-2 bites out of their meal.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Kickoff was good but last year's was stronger in my opinion. The dinner was not cooked well for the Grad ceremony and I would recommend a setup that is not as "long" where the stage makes it hard for the back row to experience the speakers. I would also recommend using the stars wall as the main wall since the servers were coming from what was the "front" of the room. The US Chamber "wall" on the stage is not seen in most class pics bc they are covered and I would recommend putting that at the door for people to take fun social media and professional photos in front of for more marketing value.
- The meal was awesome in 2016 - not sure if they have new chefs/staff this year but our table's food was over cooked and not edible. We went out for food later as a result.
- Graduation Ceremony was great but the food was dismal and that everyone left shortly after dinner made it feel like a bad wedding reception at the end.
- I liked the kick-off event with the need to gather signatures from other classes and the "need to be present to win" kept everyone there. Good idea.
- Kickoff was fun this year and the food was phenomenal. The networking was a great addition.
- Graduation was great too. Our class was a little disappointed in the fact that we had initially wanted to create a video for our 5 minute speech and was repeatedly shut down. The food was not good at the graduation.
- The only reason I gave the Big Bash a 3 was because of the food. I still am not entirely sure what kind of meat that was or why it was cooked way too much.
- The "bingo" card was a great idea but people didn't really spend time networking - just getting signatures, so it was ineffective.
- Big Bash: I always hate the wait. It might be nice if the salads and bread were preset so we could eat them when we are seated. The entree has been horrible for 3 years. I can't believe that food is up to Marriott standards.
- The dinner at the JW Marriott was very disappointing.
- Big Bash: for the second year in a row I would say the food was not good, primarily this year the steak was overdone (last year it was so rare I didn't eat it). A suggestion for the stage would be to move it so the lights are behind it, not the entrance to the kitchen.
- Nice selection of food at the Kickoff, food at Big Bash was tasteless and lukewarm at best, too long between entering the dinner and dinner being served. Thought should be given to having the "other thanks/remarks" as guests enjoy soup/salads that are on the table-- since the bar has been open for at least an hour by this time. Food sooner than later would be good. The grads could be fed dinner quicker than the rest of the room (since there's only two groups) so they would be finished once they walked across the stage. Why isn't IOM using the Marriott Starr Pass for the entire event? Learning & networking could co-exist in half-round room set-ups as opposed to classroom set-up.
- The kickoff needs to be refreshed.
- As some of us came in from far away it would have been nice to go out to the JW just an hour earlier to see some of the area.
- The food was very disappointing, a program would be helpful.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Kickoff left a lot to be desired this year. Our first year, it was really fun and we were able to get to know our classmates because we all had assigned tables as to where to sit, and, there were fun sports themed things on the tables which I remember helped us get to know each other well. This year with no assigned seating for classes, it was harder for the groups to sit together getting there later. Graduation was great, but, the food served for dinner left a lot to be desired. The steak was horrible and the veggies with it were not edible. The passed appetizers was a great touch, and, I love being able to go out on the patio for a while before being seated. We also missed the normal announcements of when busses were leaving. Typically you are warned that a bus was leaving in 10 minutes. This year we didn't get that, and, our group ended up missing a bus by a few minutes. We ended up having to take an uber back to the hotel so that we could get back when we wanted.
- The food at the Big Bash was not good. I'm not sure what the meat was, but it was overcooked and dry.
- Would like to arrive to Big Bash before sunset - to see what that view looks like!
- Big Bash food was AWFUL and I am not a picky eater at all.
- From the stand point of Event Planning, the rule is to fulfill your participants basic needs before you demand their attention. Food should have been served before the graduation ceremony. You start dinner and around "desert time" is were you start your graduation ceremony.
- The skirt steak dinner at Starr Pass was absolutely horrible. Everyone at our table had one bite and had their plates taken away. Otherwise all good!
- Dinner at bash was not good.
- With the exception of the salad and rolls, the dinner at the Big Bash was nearly inedible (and I'm not really that picky). I was surprised and disappointed in the JW Marriott as they had a room of potential customers (folks from national associations who might bring an event to their property).
- The ceremony was wonderful but the food was horrible. The meat was overcooked and the vegetables were such a bland, strange combination.
- Programming fine - not sure you could do anything differently at either. Both necessary. Liked the shorter program at kickoff. Would like time to network with my class prior to kickoff - happy hour/catch up.
- Put the stage under the Institute logo of lights. The steak was like shoe leather - better to have Chamber Chicken.
- Kickoff was boring this year with no theme. Why bus people all the way to the graduation ceremony? The beauty of the location is lost because we get there at night. It's a big expense with very little reward/return. Find somewhere closer to town and save the money for better food.
- Make it more interactive like West.
- I liked the kickoff when it had a theme, like the tailgating kickoff where we wore our team shirts.
- Both events were fun and a good way to socialize. The food at the Kickoff was good. The same cannot be said about the food at graduation.
- The Institute Kickoff is a fun event and proves to be beneficial for a way for people to meet with other classes. The Graduation and Big Bash is a great event as well however I do feel the money wasted on choice of food is unnecessary. I also suggest rethinking the meal because it wasn't edible. Money was completely wasted and this is tragic.



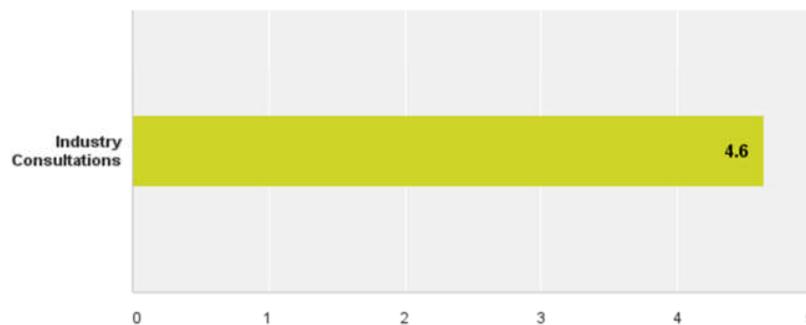
WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- The ceremony is very nice and clearly much effort is put into the event. My only suggestions would be to start earlier if possible so that dinner can be served before 8 p.m. Also, steak is a really hard dish to serve to a large group and everyone commented that their's wasn't cooked they way they like, it was difficult to cut, etc. I understand how difficult it is to choose a menu, but just some comments I overheard.
- Institute Kickoff is always a little bit of a downer. The food looks great but tastes awful and there is no entertainment. You might consider a band. Graduation is beautiful but the food has been awful 2 years in a row. I understand we are on a budget, but flank steak as a main entree is never a good idea. Next year, consider thinking outside the box on food. A deconstructed chicken pot pie or a pasta dish. If you can't do beef right, you shouldn't do it at all. And they cannot do it right with our limited budget.
- Dinner wasn't served at our table until 8:30pm, that is extremely late. Would be nice to find a way to have the dinner placed earlier than that.
- The program needs to be adjusted to allow everyone to eat a bit earlier. I would encourage the program to start during dessert.
- Both events were very nice.

Q12 Please rate your experience participating in industry consultations.

Answered: 148 Skipped: 4



Q13: Additional comments about industry consultations*:

- I valued my one-on-one consultation!
- The advice I received was good and helpful to the situation I was in.
- I really did want to do this, but felt like there was really not enough time to get this accomplished. Plus, I wasn't sure which topic I wanted to focus on. Maybe next year as it's a great value.



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ATTENDEE SURVEY RESULTS AND FEEDBACK

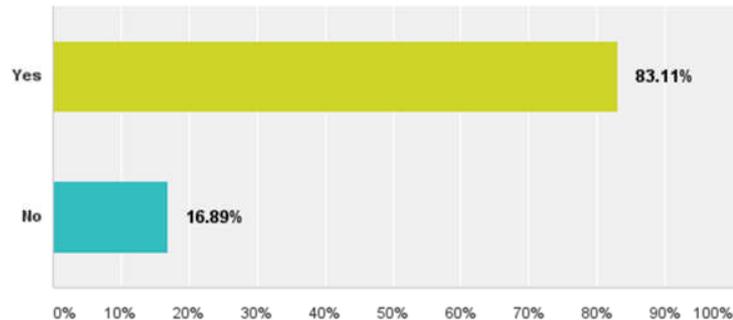
- This was my second year doing a consultation and I truly believe they add additional value to the IOM experience.
- The industry experts were fantastic. I would rather hear from Chamber Professionals who are active and making change in their communities rather than retired Chamber Presidents.
- I did not sign up to have a consultation this year, but plan to next time. I heard good things from people who had sessions.
- When I did participate at last session-very very helpful.
- I wound up just asking the person who was paired with me last year to sit down with me again. We formed such a great relationship!
- More availability of information about the industry consultations ahead of time.
- Very impressed with opportunities to talk shop before & after classes with instructors, class advisors and institute staff. Extremely accommodating staff.
- It was a little misleading what an Industry Consultant did or from what industry.
- The experience from the country I came has been limited. What I obtained outweigh to what I shared. Any way it was all encouraging.
- We met with *name removed* and *name removed* to discuss opportunities to enhance engagement with Association professionals. I'm hoping there will be follow-up discussion from the IOM staff and the Board of Regents regarding the ideas we shared and discussed.
- Not sure what the industry consultations were.
- The only mention of this was once by our Class Advisor-- but with little to no detail, such as who, topics, etc.
- Overall the experience was awesome! I am a fasttracker and have been to both Athens and L.A.
- Tucson provided the very best learning experience of the three. Great job with the instructors!
- It would be nice to see a list of faculty and their areas of expertise in advance so we could give thought to who we'd like to meet with.
- *Name removed* was awesome and so helpful. Made a friend!



ATTENDEE SURVEY RESULTS AND FEEDBACK

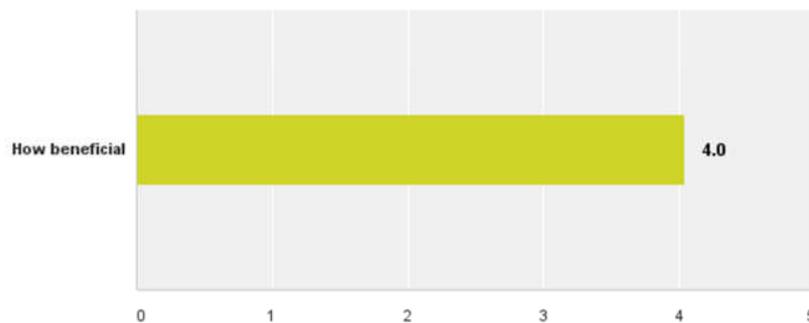
Q14 Did you download the 2017 Winter Institute App?

Answered: 148 Skipped: 3



Q15 If you downloaded the app, how beneficial was the app to you?

Answered: 142 Skipped: 10



Q16: Additional comments about the app*:

- It was pretty difficult to navigate. Our schedule should be pre-populated. It should also be linked to the silent auction for ease of use. I wish more attendees populated their personal information so that could be promoted more heavily. Also, a drop-down option to sort by class could be very helpful.
- The Winter Institute App was very useful as it has been in previous years with class information and presentations available.
- Love it. A must-have.
- Viewed using windows.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Downloaded but didn't end up using it.
- Much improved from previous apps.
- I will download the app for future IOM sessions.
- Would have been nice to have maps of the campus and surrounding areas on the app.
- I thought this year's app worked better than the one selected for 2016. I'd suggest keeping it for the future.
- The app was overall useless. A mobile responsive website with access to schedules, etc. would be better.
- Needed to be less labor intensive on set up.
- Maps of area, buildings and hotels could be included in app.
- It was helpful to be able to create my own schedule. The attendee directory was a bit tough to navigate. I would have liked to be able to sort by organization name or at least see the org name without having to click on the individual. It could also be nice to be able to sort by class number.
- Not a fan of using up more storage on my devices.
- Would be nice next year if they could link the auction within the app. I think a few people may have been excluded based on the steps needed to log in.
- This was very helpful in reviewing my classes and locations. It would be greatly beneficial if I could also review my past coursework on the app or when choosing electives in the future.
- Really liked building "my schedule." Very helpful.
- I didn't link that the whole agenda would refresh to the default setting. I would choose 3-1 and the click on a class to see who was instructing. When I went back, I had to re-choose 3-1. Also, on Wednesday, I couldn't get it to load anything when I needed it (bus schedule, agenda, etc).
- I didn't take the time to really learn how to use it. Perhaps the homeroom first class can spend time going through some of the benefits of using the app.
- It is a solution looking for a problem. Really does not provide any value added service and I will not be downloading it next year. Only looked at it once.
- Could benefit from more notifications, was slow and a little glitchy.
- Liked the app before better because you could access the silent auction from the app. This year, I had to save the text link and access it from there. But the app is a wonderful tool. Great job on that.
- Very beneficial. That was the only place I could really get information from so it was a big help.
- They all are very useful.
- It was not as user-friendly as the app from 2016.
- It would be great if the app could coordinate with our logins...so that our classes already populate the schedules.
- Very handy, app has a few little things that drove me nuts though, when adding classes to my schedule it kept going back to the original page and I would have to keep going through and find where I was which wasn't a big deal but it took a long time.
- It would be nice if the default when you pull up the calendar was your personal agenda rather than the all tracks calendar



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I used it mainly to look up the contact info for people. The Personal Agenda part was nice, but the app wouldn't default to that listing. It wasn't user friendly.
- It was very helpful. I wish I had communication on how useful it would be before I left to go.
- The app was helpful when I was not in the building, but, my cell phone provider had no service in the building, and so I never actually logged into Wi-Fi since it wasn't needed, and I had heard it would send a text message to get set up. It was nice to be able to look at attendees and staff before we arrived, as well as have the schedule available on our phones.
- When using the app, it would be nice to be able to stay on the personal agenda list. Every time I went back I would have to click the personal agenda option.
- The app was not very helpful. If you wanted to see your own schedule, you had to upload each class yourself, which was time-consuming. If I had known that I'd receive a printed copy of my class schedule upon arrival, I probably wouldn't have even downloaded the app. There were no notifications about any event or anything - I would have thought that notifications would be used to organize things like taking class pictures, announcing meal options, reminders about the silent auction and how to participate, and/or announcing where to be at certain times for special events. Since this was all taken care of by the amazing staff, there was really no need for the app. I also thought the app would allow us to access materials uploaded by the faculty for classes, but that wasn't there either. Basically, anything I expected the app would provide, it didn't. But the staff was really great at helping us know where to be and when for special events and stuff, so it all worked out. I just wouldn't bother with the app next time unless it had a few more features on it.
- Didn't use it.
- It would have been nice to have all presenters' handouts there (some had posted supporting documentation but not their actual PPT)
- Didn't need to reference it. I had a printout of my schedule.
- Next year, I'll upload my printouts to One Note so I can take notes directly on the Ppt slide.
- The app is great! I like being able to create my own schedule there. I would add maybe having the option to do surveys through the app. It would save paper and time if people could do them that way.
- Awesome Experience! Would be nice if there was a component for continuing education.
- Looked great this year. Very user friendly.
- Love this app - so helpful.

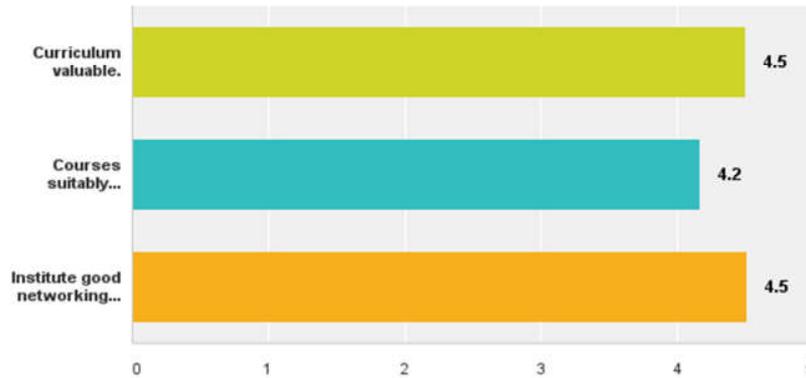


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ATTENDEE SURVEY RESULTS AND FEEDBACK

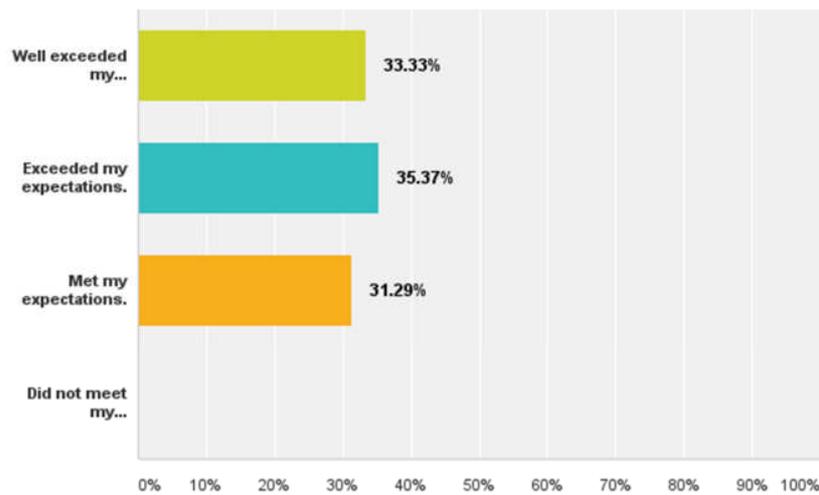
Q17 Rate to what degree you agree with the following statements.

Answered: 148 Skipped: 4



Q18 Overall, to what extent did Institute meet your expectations?

Answered: 147 Skipped: 4



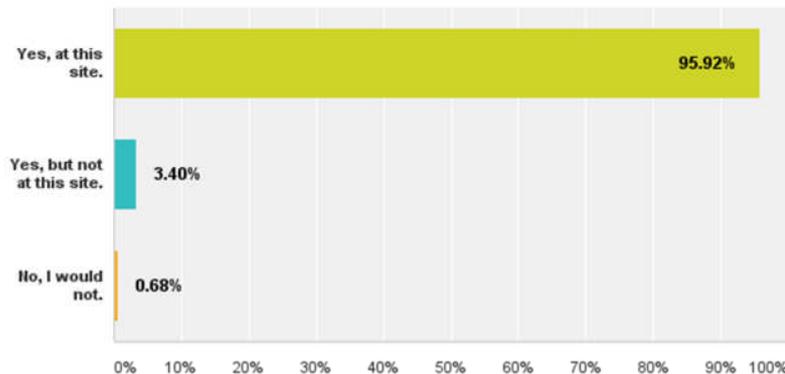


WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

Q19 Would you recommend Institute to other nonprofit professionals?

Answered: 147 Skipped: 4



Q20: Additional general comments*:

- Institute far exceeded my expectations. 6 of the 9 courses I had were super beneficial to me in my career and professional development. The only odd thing is that 18 of the 21 individuals in my cohort were from Chambers while I am from an Association, so that class segmentation could be done differently (although I do love every one of my classmates and they offered a different perspective).
- Overall, Institute was nice. I did not care for the lunch option. Also, I would request that there be something other than beef for the Graduation.
- Maybe because I had just started in the chamber industry when I came the first year, but I feel like the first two years the classes were much more informative. I have been somewhat disappointed the last two years and especially the 4th year.
- I loved it. My experience at Institute was engaging and inspiring. It was just what I needed at this point in my career. I hope to complete all 4 years!
- Institute remains a great go-to professional development resource so far in the field of non-profits.
- So glad I participated in this program. Such great takeaways! I do feel like we could have had maybe one afternoon for a bit of free time - there was just no time to enjoy the beautiful campus. Even maybe one day of finishing at 3pm - a few hours to wind down.
- Good experience overall.
- It seemed like the interaction with the Board of Regents has gone down from our first year...not sure why, but the limited interaction was well received though. *Name removed* was our class advisor and she was great. Also, *name removed* is awesome and truly represents Winter Institute in the way he interacts with participants. Please, take a look at the food, it is getting stale after 3 years. It would be nice to change it up a bit.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Would have been nice to hold all of Institute at the JW Marriott. Classes and rooms. Just a thought!
- Great food options this year for meals and hallway snacks. Perhaps the hall food tables could be split into each end of the hall for shorter lines, but the flow did seem to go fairly quickly and without blocking other hallway traffic.
- One of the best professional and personal experiences of my adult life.
- I would like to see more thought given to the breaks and shortening the food lines so we could all have time to get food and still get back to class on time. I know the challenge of catering box lunches but would just say that I thought they were average in quality. I also wondered a bit about the sequencing of the Institute kickoff? I'd liked the idea of using the signup sheets to ensure appropriate mingling. I thought that was effective. I'm not sure that eating and drinking should have proceeded the talks and I thought there might need to be more specific interactions with class advisors and regents supporting a given class.
- I enjoyed my Institute experience. I think we are (in some cases) over-exposed to certain instructors who offer feel-good classes but no real take-home experience. Obviously instructors like *name removed* are good to see for various classes as he tailors them to different topics and always provides valuable information. *Name removed*, for example, provides a rah-rah class but not much else. For anyone to have to sit through more than one of his classes is a waste of time.
- Excellent job by staff and volunteers! The interactions both in our class and with members in other classes contributed greatly to the learning experience.
- I would still like to see more association specific courses or at least more association examples in courses designed for all. I appreciate the association networking event.
- Congrats to Institute Staff on another successful year! Everything was great. The staff and volunteers were very friendly. A+ for customer service!
- I have two suggestions for next year:
 - 1) The curriculum was very chamber-focused. I am from an association, and a few of the classes were geared toward chambers and not relevant to me. For example, government relations, technology, and events classes were all chamber talk. If IOM keeps marketing itself as for chambers and associations, I would suggest gearing more classes toward associations.
 - 2) Have more snacks and lines during snack breaks. The line was way too long and there wasn't enough food for everyone. Those who had to wait 15 minutes in line often ended up with slim pickings.
- Thank you!
- I completely understand the schedule this year and next because of how the dates fall. Maybe some group activity (hike) could be arranged for those who have never been to Tucson and those that come back every year. Maybe this has to take place before registration but just include something as an option.
- Coffee in the morning in the hallway before classes begin would be greatly appreciated by many.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- The schedule this year was tough...our class really missed the afternoon off in the middle. We really bonded on those days in the past. To have it be replaced with an extra-long day made for a hard time and sapped energy for the rest of the week. I don't see why the Sunday couldn't have been a full day in order to restore the afternoon off.
- The courses need to be more challenging and having more industry data and trends discussed would be helpful. Too many instructors went over the "basics" for it to be my 3rd year.
- Due to the schedule this year with the holiday and school calendar, I would rather have had "homeroom" take place on Thursday morning with opening reception that night and class dinner/Institute's got talent on Friday night. It would help with flight schedules and trying to make it in time for homeroom.
- Met with *name removed* and *name removed* to request that the core competencies of Institute be road mapped with the domains of the CAE so Association folks know where they need extra focus if it wasn't covered at Institute.
- I would recommend the badges be color coordinated, especially 4-year students. For conversation purposes, it is beneficial to know the level of professional development of the persons.
- Everything was great! The lines during breaks for food were long. I would like to see two separate areas for food to slow down the wait. Thank you for all you do to make the experience wonderful!
- At the college location it would be helpful to have snacks set up on both ends of the building to help with the long line. Also check with Athens, their breaks are fabulous!
- Be aware that some instructors are very "I" focused in their presentations, touting their accomplishments and publishing during instruction, at the expense of larger concepts that are more beneficial to the class.
- Please make sure you have ordered enough food during the breaks. For the first two days of the event I was always the last person in line and typically there was either nothing left or just one item.
- It would also be helpful to have two break areas so that we didn't spend the entire 30 minute break standing in line. Overall, it was a great experience and I am so glad I am involved in your program. It truly is helpful with my position (especially since I was in a completely different kind of field before coming to association/chamber work).
- As I am sure you have already heard, the snack line during breaks could use two lines like last year to get people through, so they can enjoy their break outside. Food is always great and y'all do an excellent job trying to please everyone's needs, which is a big task. I like the rooms better this year than last but the walk was much longer and if it were to rain like last year that would be horrible. I tell people how organized it is for that many people for that long of time. Great job overall.
- Please consider changing the food options.... we need more variety especially after knowing what options are available at other institutes.
- I heard from past attendees that the schedule used to allow for an early release one day. I would recommend bringing that back and extending the schedule longer into Sunday. Overall, a great experience!



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- It was an amazing experience for me. I would have liked to have had an elective opportunity at some point about Leadership programs. I think most chambers have Leadership programs (some even have them for adults and teens) and I would love to have been involved in a course about that...best practices, how to put together a successful program, etc.
- During breaks there needs to be at a minimum 2 tables of food and beverage. The one table caused a very long line and little options of food for those at the end of the line.
- Lecture skewed to chambers and staff new to their professions. Instructors seem more interested in prospecting business opportunities.
- Understand that due to New Years and U of A's schedule we had to start on different scheduling-- however, not as much down time to network with other classmates as last year--on a non-structured day.
- Institute well exceeded my expectations. The staff was incredibly peppy and friendly, making it fun. The faculty was incredibly knowledgeable and I couldn't believe the value I got from the program because these speakers were world class experts in their field. Everyone in my class was so nice and I got to meet other young professionals. I was also impressed with the healthy food at break and lunch. So great!
- We're not training to be Navy Seals. This boot camp mentality is bologna. It takes all the fun out of Institute. The information is great but there is nothing enjoyable about the week. No time to sleep. No time to get work back home done. No time to enjoy the company with peers. I've said this every year in these surveys. I'm not looking for a vacation. I think the information and speakers are outstanding. But there could easily be some editing and creating some time to start a little later, end a little earlier, maybe a half day off so we can be tourists since we've flown halfway across the U.S. to be here?
- You guys can take half the day eating in the staff room if you want. But it's very disrespectful and, frankly, ridiculous, to treat us that way. It takes 10 minutes to even get through the line and close to 15 to get food and drink ready, find a place to eat then start eating. We're grown-ups.
- Again, I think the information and speakers are outstanding. However, you can tell that the speakers are grasping to fill the amount of time. That's why I insist that the schedule could be edited and remain just as impactful. This year, at least 2 of the speakers ran out of things to say/do with 30 minutes left on the clock. And we were forced to remain in the room like children until the "bell rang."
- I would love so much for the committee that orchestrates my final year to take into consideration that many of us are coming great distances and changing time zones. We are weary from the outset then are subjected to this military schedule that leaves no room for rest, catching up on work back home or, frankly, enjoying the trip to Tuscon just a little. I remain puzzled at the least and shocked at the most that IOM doesn't think of this. I'm not saying water down the information the educational experience. I'm saying that you can have the same impact within a shorter class time and this year, for sure, I sat in classes where the instructors were very obviously straining to fill the time slot.
- Not asking for a vacation but the ability to catch up on rest, work and, yes, have a little time to socialize and see a bit of Tuscon would go a long way in my recommending this program.



WINTER

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- As it stands, no matter how excellent I think the topics are and the quality of the instructors, I would never recommend IOM without giving the caveat of the boot camp, Navy Seal mentality when it comes to the scheduling. The grown-ups I would be talking to will (and have) take that into consideration before committing to something like this.
- The food was great and I love going to Tuscon.
- I felt the curriculum was subpar this year. Maybe I have reached the point of already knowing most of the information, but I also felt some of the instructors weren't very good. They worked so hard to be fun that they forgot to teach us anything. This year also felt very rushed. Barely time to eat lunch most days. I was running from one thing to another. And we got in trouble for going to the bathroom. If you only give us 30 minutes for lunch and then a two hour class without a break, then yes, we are going to have to go to the bathroom.
- Our advisor told us that we have to stop leaving the room and to go at break time. I am older and if I need to go to the restroom I will - we are professionals. What I did not like is that we got in trouble and it was confirmed by the other class advisor that it was only our class. Again we are grownups and I believe it did not come across very good and it offended everyone in the class. Then the gossip/allegations start going around.
- Everything have been very good. Keep it up!
- I might recommend Institute to someone earlier in their career or without significant non-profit experience. I expected year 2 classes to be much more challenging, but did not find them to be challenging at all. The networking and ability to discuss current challenges I'm facing with my peers is what brings me back to Institute.
- Evaluate the usefulness of the calendar/note pad that we all receive. I heard many people say it went in the trash as they do their calendar electronically.
- Always impressed by *name removed* and the team - kudos especially as I noted *name removed* talking one of our classmates to urgent care after falling; *name removed* for working with our other two classmates who were unwell for other medical reasons; and to the unnamed regents and chamber staff who made the experience special and powerful for our site. Especially for us in 2-1 this was a powerful event. Thank you with all sincerity. 2018 shines bright in our eyes for sure!
- My class had a rather negative experience with our class advisor. She was not helpful when class members would ask questions and often seemed put off and irritated that questions were being asked. This included basic questions about schedules, transportation, electives and other activities. Additionally, she did not appear to be interested in getting to know those of us in the class and did not take any opportunities to get to know us. I feel that a class advisor's role is very important in unifying a class as well as providing valuable information to class members and unfortunately this was an element lacking with our advisor this year.
- Our advisor also stated a few times that she did not know her role as a class advisor and that her Regent partner was not around. I don't know what the selection process is for class advisors or what training and information they are provided but from my experience this year and the things heard from my class advisor there may need to be greater training.
- Please consider incorporating diversity and inclusion sessions into the core curriculum or at very minimum elective level.
- Love this program...it has been a fantastic 4 years.



WINTER

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- Best conference/education seminar I have ever been to. I came away from the week full of ideas and thoughts that I can right away implement into my chamber....awesome week!
- The class schedule was so aggressive this year that we didn't have much time for networking. It was very tiring. I would rather start early on Wed. so that we could have the half day on Friday. Also, the first lunch is too long and the others are too short. If each one could be 45 min that would help. Lastly, 8am every day is very early.
- I appreciate the effort to end by 11:30 a.m. on the last day to allow people to catch flights that day, but the day when there were 9 hours of classes was mentally exhausting. I lacked any energy to participate in networking activities that night.
- I liked the new schedule of getting out at half a day on Sunday so that I was able to make it home the same day.
- I registered for IOM for two reasons: (1) I'm already a CAE and need hours and (2) it's outside of the norm ASAE events/networking, so it offers something different. With that said, the IOM staff would know that I'm a CAE, so a lot of the 1st Year courses were more basic than I needed--especially the first 1.5 hours of the core classes. I could have used that time more wisely, or the IOM staff could have had the CAEs in a different half-session during that time.
- Shorten the lunch time on the first full day. (Thursday 1/5) Add 15 minutes to the box lunch days, (Friday, 1/6 and Saturday, 1/7). The food lines, should be broken apart and replenished.
- I really enjoyed the Institute overall. I felt that the instructors for core classes were markedly better than elective instructors. I would also strongly encourage more of a seminar format for classes. Almost every teacher said they were not going to stand up in front of the class and talk the whole time, and yet most of them did. I would much rather have instructors harness the collective intelligence in the room and foster more constructive discussions rather than relying on the outmoded lecture style of instruction.
- I came in as a 3 year from WACE Academy but it was actually my first year with Institute. I noticed that a few of the fast trackers and I had a more difficult time in location and logistics. Overall it was a good experience for professional development.
- Appreciated the break times and the snacks. It would be great to have tables at opposite ends of the building, the lines were very long.
- Have all class monitors hand out evaluations 10 minute before ending. Many times speakers were trying to cram the rest of their info and we didn't get them until right at end time.
- I had to make up my third year and I was very happy I did! It was a great experience.
- I found the staff to be very helpful, organized and very enthusiastic! The instructors were amazing. I found only one core class that was too much like a previous core class I had. Overall, my experience was amazing and exceeded my expectations.



WINTER

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- The breaks need to have a better set up. Our class was at the opposite end of the building from the food area, and, so by the time we would arrive, line was so long, sometimes we missed out completely on snacks. Possibly having 2 sets of tables would be a good flow, allow people to get to area closer to their classrooms, plus, still have time to go to the bathroom during a break. 15 minute breaks proved difficult to get both things done. We would really like to see 4th years potentially having one class on the day of registration, so that we can enjoy graduation with our classmates without having to get up to be at class at 8 am the following day. I did enjoy having classes ending at 1130 as compared to 4 pm on the final day, so that I was able to fly home on final day of classes, but, also missing out on the free afternoon which allowed me to get some work done, since I don't work while in classes. Overall, I love my time at institute, and I am willing to follow whatever schedule works :)
- I was very impressed with the high level of professionalism through the entire 5 days. The speakers were outstanding leaving me wanting more. The Board of Regents were very helpful and friendly. I plan on attending next year!
- Air conditioning in classes was running like crazy.
- Going to 6:00pm made for a very long day of sitting.
- There are a decent number of Associations in any given location or class, and yet the curriculum is almost exclusively geared towards chambers. Perhaps designating certain electives as C or A or both would help us select those that re more geared towards our interests. It's hard for me to wholeheartedly recommend this to other association professionals given the current focus.
- I learned so much at Institute and I met some wonderful colleagues from around the country. It was a fantastic experience and I will be back each year at the Tucson location. Also, this was the healthiest conference I've ever attended - talking about food options. Great job! In fact, it was so healthy that I feel the need to let you know it would be ok with some of us if there was a higher cookie to vegetable ratio for afternoon snacks.
- I learned so much that I am still in the process of taking notes on my notes! Thank you for this amazing program!
- There were a number of sessions (events, revving revenue, recruit/engage your members) that were presented from strictly a chamber perspective without much regard for association dynamics. I'd suggest pairing a chamber professional with an association professional to provide a balanced perspective. As an assn professional, I enjoy broadening my knowledge of chambers, but also expect the content to be geared in part to associations.
- Separating Chamber and Assoc classes would help. Many classes are geared only towards Chamber leaving Assoc with little to take away.
- I appreciate the effort to offer healthy snack options to attendees, but the afternoon snack of dyed vegetables was not in the least bit appetizing. The arrangement/setup of the food was awkward too. The drink station should not have been so close to the food station and the fact that there were two lines/two access food should have been made clearer.
- Loved every minute of it. Taking out the free time that was normally set aside one afternoon made for long days, yet it was necessary. Liked getting out before noon.
- The courses this year were very bland. Thank you for bringing in more speakers who have dealt with associations, though. That was helpful and it was not so chamber specific as it was last year.



WINTER

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- Fantastic third year. Thank you
- I had *name removed* this year and was not impressed. I didn't walk away with any valuable information. All of my other instructors I did find very valuable.
- The kick off never blows my hair back...I am not sure what could be done differently. Our class plans to 'mentor' 1-2 next year work with IOM staff to identify who they are and partner them up with a class member of 4-2. I suggested 4-1 working with 1-1 so they didn't feel left out, but then we realized there were 3 1st year classes this year....hmmm. Help with this would be great. Thanks.
- I would 100% recommend institute for chamber executives. Association executives is more of a mixed bag and I may or may not recommend institute. Many of the teachers come from the chamber world and several times the class is catered specifically to that and I find little value in it as an association executive as it just isn't applicable. I also wish that there were more electives and fewer required classes. For example, in 4th year you take a technology class - which is great if you are in any way involved in that. But we have an IT consultant that handles that exclusively and I found the content to be completely outside of anything I deal with or would have to deal with. But then, in other electives, I found myself wishing I had more time and more options around that topic. I think having more opportunity to choose your courses and having electives be the length of core classes might be helpful in feeling like you left getting what you needed out of the program. I do also want to say, that it is a wonderful program and I can imagine how difficult it must be to pick curriculum, find teachers, etc. Most of my finding lack of value is because associations operate differently in some ways and tend to have slightly larger staffs than chambers so there is more divisional work. I don't know if it is possible, but maybe there can be an association track. This may be incredibly time consuming and not feasible, but just some food for thought. Thank you all - staff, board, advisors, etc. for the time and effort you put into making Institute a valuable tool for continued education. It isn't easy and trying to meld the needs of 100s of people is not easy. I truly appreciate the work it takes to coordinate such an event.
- I am very disappointed to get to my fourth and final year only to discover both *name removed* and *name removed* were not asked to instruct. Both made huge impressions on me during years 1 - 3 and I am sorry for those classes that missed out on learning from both of them. I can tell you I had one or two professors teach me more than one class over my four years and I heard the same things again and again from them. Those are your instructors that need to be reevaluated over *name removed* and *name removed*.
- I would like to recommend that *name removed* always end a four year class. His class with 4-2 on the final morning was excellent and pulled us together one final time and ended with "love them", referring to our own personal staff. Thank you for the incredible four years. Lifelong friends with classmates, advisors, instructors and more. Valuable information and instruction I can take with me as I advance in my personal career. These things are what Institute is all about.



WINTER

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- *Name removed* and *name removed* are outstanding people, but I think it may be time to bring in former executives with more recent experience. I say this respectfully of them both, but I think their information was fairly outdated and not on the cutting edge of our industry. We need either more recent or currently serving executives or more people from outside of our industry with expertise in an area. For example, event planning class with *name removed* was unhelpful, other than from the learning and interaction among class members. Having a CMP or someone who has planned and executed events more recently would have been more helpful. Again, I have a lot of respect for them both, but I think it's time to rotate some of the faculty. Great week all around, though! Can't wait for next year!
- Thank you for a wonderful experience. I could not have asked for better instructors, advisor, etc. The bar is set pretty high for future years.