



CONSENT AGENDA

WINTER CHAIRMAN'S REPORT, FALL 2016

2016 Winter Institute was a huge success. I am so proud to be associated with the awesome Board of Regents and Class Advisors that serve the Winter site. I would like to recognize and thank the 2016 Winter Chair, Jack Lank, IOM. The entire Winter Board of Regents and Class Advisors would like to thank you, Jack, for your leadership, dedication, professionalism, and friendship.

The Winter Institute team has set our attendance goals for 2017 at 258 total attendees with 94 first-years. While on-site, members of the Board of Regents and Class Advisors made a concerted effort to discuss the importance and the value of attending Institute with all attendees. We encouraged all attendees to spread the word and promote the Institute program to all of their colleagues in their respective states in the association and chamber industries.

Through personal outreach and with the assistance of the Institute staff, we had the opportunity to distribute and market Institute at our state and regional conferences. As we get closer to the enrollment deadline, regents are assigned a list of previous attendees to reach out to and encourage them to register, as well as make them aware of scholarship opportunities.

The Winter Regents have set three main strategic goals for the upcoming year. The first is to meet or exceed our attendance goal. The second is to raise \$10,000 for the scholarship fund through the silent auction and other on-site fundraising. The third strategic goal is to increase attendance by professionals in the association field. By having a concentrated marketing effort for associations, we have made it a goal of increasing total attendees from associations to 20% at Winter Institute.

Social media continues to play an important role in our promotion of the Institute program throughout the year. With Institute staff continuing to provide relevant content and reminders to the regents, we ask that all past and current advisors and attendees like, share, retweet, and repost information about Institute to help both retain and recruit attendees. We expect that social media will continue to be an integral part of our outreach.

While on-site in Tucson with the use of Guidebook, volunteers and attendees have access to general information, class schedules, faculty, volunteers, and staff. This past year we again used an online bidding system for our silent auction, which was a huge success. We continue to see the success of roundtable discussions during lunch breaks, and will continue to look at ways to improve and expand them.

I am truly honored to serve as the Chair for the Winter Institute, and am blessed to be associated with such a great group of thought leaders in the association and chamber industry. I appreciate the dedication of the Board of Regents, Class Advisors, faculty, and Institute staff to make Institute a great experience for the attendees!

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



CONSENT AGENDA

MIDWEST CHAIRMAN'S REPORT, FALL 2016

What a pleasure it was for all of us on the Midwest Board of Regents to head to Madison for another incredible Institute week. Our team spent the year serving as ambassadors for the Institute experience and focusing on our three Rs: recruitment, retention, and relationships.

RECRUITMENT

While we did not achieve our recruitment goal for number of first-year attendees, the two first-year sections who joined us this summer added a lot to the Midwest family. They demonstrated strong engagement in the classes and in the networking. Their commitment to using IOM to grow their professional skill sets and become better association and chamber leaders was clear. I suspect that their word-of-mouth testimonies will be among our biggest assets when recruiting for 2017.

We also saw a drop in attendance for our fourth-year class, which we attribute to fast-trackers and scheduling conflicts.

When sharing the Institute opportunity with prospective students, being able to talk about the scholarships available made the conversation easier. We were pleased to award scholarship assistance to almost half (21) of the first-year class.

In addition to our in-person recruitment efforts, all board members actively promoted the IOM experience through their social media and LinkedIn accounts.

RETENTION

We are very proud of the retention we saw in our second- and third-year classes. We achieved over 100% of the retention goal for the second-years. In their second year, this particular group is showing a lot of promise in terms of future IOM Class Advisors, regents, and faculty. We were very close to achieving our goal for the third-year class. I believe we missed the retention number only due to the fact that some in the class did not return due to fast-tracking.

Scholarships played a key role in our retention efforts as well. We awarded 20 scholarships to attendees in years two through four, including one full scholarship funded by the Class of 2015.

RELATIONSHIPS

One of the key benefits of the IOM experience is building a professional network. For the past couple of years, we have made industry consultations a strong focus point for us. The depth of expertise among board members has allowed us to provide counsel to attendees on a broad variety of topics. We had more than 30 people request consultations.

We had a brand new silent auction team this year and they put the FUN in fundraising with an auction full of great items that created some competitive bidding. The auction team is already cooking up some new ideas for next year. The auction, combined with our sales of Bucky Stars and a Sweatin' for Scholarships Zumba class, raised a total of \$3,844. We look forward to awarding those scholarship dollars to new and returning students in 2017.



CONSENT AGENDA

MIDWEST CHAIRMAN'S REPORT, FALL 2016

Our Class Advisors are the foundation of the class experience and we always have the most amazing folks volunteer. The Regent Partner program is very strong in Madison. The level of engagement with the classes by the regents effectively creates two Class Advisors. This allows for the regents to get a real sense of talent and expertise among the attendees and for the attendees to develop strong relationships with board members.

For the second year, we offered an Instagram scavenger hunt. We provided a set of items that attendees should be on the lookout for during their week in Madison. When they saw an item, they posted to Instagram with the #iomeducates hashtag. Some attendees saw it as a way to connect with their classmates so they went in small groups in search of items on the list. However, overall participation has been slow, but I think it could gain some traction over the next year or two.

The graduation program was lovely in both location and content. In the second year of the new format, I am quite sure no one misses the old one! The testimonials given by the graduating class are one of the best retention tools in our toolbox. After the ceremony, I heard more than one first-year student remark that they were "committed" to the program.

Final Words

On behalf of the entire Midwest Board of Regents, I would like to express sincere appreciation to the IOM staff. They are the very definition of professionalism and we are honored to work with them.

Thank you to the Board of Trustees for their thoughtful guidance of the IOM program. So many will benefit from the work that you do to maintain the quality of the IOM experience. Personal thanks to Bob Thomas who is an inspiration to me.

The new chair of Midwest will be Jodie Perry. It has been a pleasure to work with Jodie and I know that under her leadership, this board will continue to shine.

To my board: To say that I love you all is an understatement. I am always amazed at the level of commitment you show in all areas of your lives, let alone Institute. From our board calls and email exchanges to Grainger Hall and State Street, you always bring your "A" game. Thank you for allowing me the honor to serve with you. I count my time with you as one of my greatest personal and professional experiences.

Submitted by: Teresa L. Eyt, IOM
Chair, Midwest Board of Regents



CONSENT AGENDA

SOUTHEAST CHAIRMAN'S REPORT, FALL 2016

The total attendance goal at Southeast this year was 262. While we did not quite meet this aggressive goal, our regent team performed admirably with a final count of 244, an increase of 2 attendees over last year. We fell short of our first-year goal of 99, but I was proud of our retention, which was at 100% or better for second- through fourth-years.

The Southeast Board of Regents is comprised of individuals passionate about and willing to give of their time for the betterment of the Institute program. Each has his or her own story and perspective to share, which correlates to developing true connections with our attendees. As a result of this, our biggest success this year was the overall atmosphere of cooperation and teamwork by our Class Advisors, regents, and the faculty while maintaining an informational and enjoyable week for our attendees.

Furthermore, we were very pleased to have raised \$7,120 in scholarship money to use for 2017. The Bidr mobile app and sales of "I love IOM" heart stickers were both important parts of that success. Another success was our industry consultations, of which we had 38 this year.

While we had many successes at Southeast, our biggest challenges were first-year recruitment and our continued need for increased diversity and association attendance. We made good progress in these areas; however, success will require more focus and attention for several years to come.

Moving forward under Kim Dahlsten's leadership in 2017, the Southeast Board of Regents will strive to emulate the three Cs of mentorship: competency, care/compassion, and comradery. To ensure a successful 2017 year at Southeast, recruiting will be the major focus and she plans on using the approaches listed below to achieve success.

1. By utilizing the list from Institute staff, regents can divide and conquer with calls to attendees from 2016. For first-year attendees, we will welcome and invite them to return for year two (this can be done early on prior to registration going live).
2. Continue to focus on growing association attendees. Contact state associations (phone, email, or letter) to encourage their participation in Institute.
3. Continue to engage with individual state organizations and share your Institute story.
4. Once registration is open, share through social media, ensuring to include scholarship and enrollment deadlines. Consider sharing the following: "What have you gained from Institute?" "Why is Institute worth your time?"

Other strategies for 2017 Southeast Institute overall success include:

- Email separately about silent auction; perhaps using testimonials from returning students on what the scholarship meant to them.
- Utilize 'How can we help?' from the regents early in email communications so all attendees know we are a resource for them throughout the process.



CONSENT AGENDA

SOUTHEAST CHAIRMAN'S REPORT, FALL 2016

- Coordinate social media using Institute Facebook posts (share on our individual pages for greatest reach).
- Continually share stories on why "Institute matters" and any of the other items from weekly regent emails listed above.
- Share deadlines early and often for registration and scholarships.
- Utilize individual social media posts, i.e. "Welcome first-year attendees!" or "We look forward to seeing you back!"
- Share gratitude through social media, i.e. "I volunteer with the Institute program because...."

I want to applaud the Board of Trustees and the Curriculum Committee for recent focus and improvement of Institute faculty and coursework. I feel confident that continual emphasis on relevant, engaging content and use of industry and outside faculty experts will foster retention and strong word-of-mouth recruitment. Institute is the driving factor in my success as a chamber executive and I am proud that the leadership, staff, and volunteers continue to be committed to making that happen for so many others.

Our Southeast Board of Regents has been blessed with dedicated leadership for over 53 years. As we are each humbled and honored to serve as a Southeast Board of Regents volunteer, it is our obligation to step up and each give all we have for the program's future success.

Submitted by: Mark L. Field, IOM, CCE
Chair, Southeast Board of Regents



CONSENT AGENDA

WEST CHAIRMAN'S REPORT, FALL 2016

On behalf of the attendees, faculty, and the dedicated Class Advisors and West Institute Board of Regents, it is my pleasure to report West continues to be the best!

Our 117 attendees included 30 first-years. While we missed our first-year goal by a mere five individuals, we exceeded our overall goal of 111 by six, or in other words, we achieved 105% of our recruitment goal. We are confident the 2016 recruitment success will provide a good pipeline of attendees in 2017 and beyond.

We were fortunate to have multiple successes during our week at Loyola Marymount University in Los Angeles, beginning with registration and the Kickoff event. Board members and staff assured each attendee was greeted and provided with information and insight. The Kickoff event featured Chamber Family Feud. It was low-tech and high-energy, and involved multiple individuals from every class and a good number of board members and advisors. More important was the comradery and professional relationships that were rekindled and established during the week. Professional development aside, relationships are the great take-away from Institute.

One of the great legacies of West Institute has been scholarship fundraising. For the past five years, West Institute attendees, faculty, and volunteers have raised just shy of \$50,000, which includes nearly hitting our \$10,000 goal this year, and surpassing that goal in 2015. Our fundraising efforts have provided important financial support to nearly every attendee who applied for a scholarship. We hope to continue to grow this effort in the future and support even more scholarships for the program.

The West Board of Regents utilized social media for recruitment by following the staff recommended posting calendar. In 2017, regents will look for more creative posts to traditional social media outlets. The regents are already considering an internal contest for the most social media activity that relates to West Institute. This challenge will be discussed as part of the overall recruitment strategy following the Fall Board Meeting.

A major focus for 2017 will be recruitment, specifically asking regents to step up and recruit more aggressively. We need to grow the West site and set our sights high for growth. One recommendation we have made to staff is to extend the scholarship deadline for the final two sites of the summer, which includes West. This may help our scholarship fund be more effective in helping recruit first-year students.

As we look toward 2017 and beyond, I am confident in the volunteers who have stepped forward to serve as Class Advisors and members of the Board of Regents. More than that, I am confident in the leadership of Kelle Marsalis of the Dallas Regional Chamber, and Brad Lacy of the Conway Area Chamber, as well as the new editions to the board. Each of these amazing leaders has a commitment to professional development and to continuing our work to support diversity and inclusion at West Institute and the association and chamber industries as a whole.

This year we say goodbye to one of the great leaders and role models in the chamber industry, Marianne Virgili. Marianne has served in many Institute leadership positions, and has been a tireless advocate for the industry, professional development, and West Institute. I am honored to call her a mentor and a friend.



CONSENT AGENDA

WEST CHAIRMAN'S REPORT, FALL 2016

In closing, I would like to acknowledge the impact the program has had on me both personally and professionally. As a gay man and working for a GLBT chamber of commerce, I never know how I (or my chamber) will be received in what might be considered traditional organizations. From my first day at West Institute in 2008, I have experienced nothing less than acceptance and support. Thank you for creating an inclusive environment that allowed me to realize my professional goals.

Submitted by: Tony Vedda, IOM, CCE
Chair, West Board of Regents



CONSENT AGENDA

NORTHEAST CHAIRMAN'S REPORT, FALL 2016

2016 Northeast Institute was a great success! Thanks to a dedicated Board of Regents (including several long-term volunteers), excellent advisors (the majority being new), and of course our outstanding faculty and awesome staff, the Northeast Institute team scored big this year based on the many wonderful comments and feedback from attendees. This is a true testament to the uniqueness and quality of the Northeast site.

Our strategic goals included enhanced marketing to increase recruitment to 174 (with 64 first-years). While we fell a little short of our goal with a final enrollment of 166 (with 56 first-years), board members were active in recruiting attendees with a focus on increasing diversity. Letters co-signed by all regents were distributed through email to Northeast graduates all the way back to 2007 encouraging them to recruit attendees.

Regents of the Northeast Board started the year eager to build on the successes of last year.

- We continued to make adjustments to the Institute Kickoff with the addition of outdoor games, which were a big hit that helped attendees build comradery.
- The silent auction was changed this year to include a separate room to display auction items. As promoted, items were more universal in nature, and less geographic-specific. We also went back to the former paper bidding system to show bidder competition and for easier access. A Zumba class led by Chairman Thomas was also added.
- In an effort to further enhance our customer service, all regents were actively engaged in welcoming and coaching attendees and assisting advisors, continuing to further outline expectations. Welcome letters with a small gift were distributed again this year to each of the attendees at registration. In addition, a themed, small gift with a message and social media call to action was distributed to attendees on each of the four days of Institute – donated by the regents.
- A social media plan was developed and implemented this year that resulted in an increase in our social media presence about the importance of the program.
- The Northeast site is also known for its quality and meaningful graduation ceremony, followed by the Big Bash, which was another highlight. This year, the event featured a plated meal rather than a buffet, which was well received.

We were excited to have several new and returning leaders on the Northeast team who are committed to making Institute a success. Many have commented that the special bond among the volunteers can be felt throughout all attendees – yet another success of Northeast Institute!

I offer much gratitude to the Northeast team.

Submitted by: Chris E. Wallace, IOM, CCE
Chair, Northeast Board of Regents