

# WINTER



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

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## 2017 BOARD OF REGENTS ROSTER

### CHAIR

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

### PAST CHAIR

Jack Lank, IOM  
President  
The United Regional Chamber of Commerce  
42 Union Street  
Attleboro, MA 02703  
508-222-0801  
jack@unitedregionalchamber.org  
Term: 2016-2017

### Kara Beer, IOM

President  
Battle Creek Area Chamber of Commerce  
34 West Jackson Street, Suite 3A  
Battle Creek, MI 49017  
269-962-4076  
kbeer@battlecreek.org  
Term: 2016-2018

### Steve Halter, IOM, EDFP, PCED

President  
Greater Poplar Bluff Area Chamber of  
Commerce  
1111 West Pine Street  
Poplar Bluff, MO 63901  
573-785-7761  
shalter@poplarbluffchamber.org  
Term: 2015-2017

### VICE CHAIR

Stephanie M. Parton, IOM, CAE  
Director, Marketing Communications  
Indiana CPA Society  
8250 Woodfield Crossing Boulevard #100  
Indianapolis, IN 46240  
317-726-5026  
sparton@incpas.org  
Term: 2016-2017

### Steven Baas, IOM

Vice President for Government Affairs  
Metropolitan Milwaukee Association of  
Commerce  
756 North Milwaukee Street, Suite 400  
Milwaukee, WI 53202  
414-287-4138  
sbaas@mmac.org  
Term: 2015-2017

### Karri Clark, IOM

Director of Sales and Membership Operations  
Bozeman Area Chamber of Commerce  
2000 Commerce Way  
Bozeman, MT 59715  
406-922-0448  
kclark@bozemanchamber.com  
Term: 2016-2018

### Mike Hofman, IOM

Executive Director  
Orange City Chamber of Commerce  
509 8th Street SE  
Orange City, IA 51041  
712-707-4510  
occhmbr@gmail.com  
Term: 2016-2018

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## 2017 BOARD OF REGENTS ROSTER

Rick Howe, IOM  
Director of Visitor Services  
Jackson Hole Chamber of Commerce  
PO Box 550  
Jackson, WY 83001  
307-201-2294  
rick@jacksonholechamber.com  
Term: 2014-2018

Nick Kieffer, IOM, CP  
Vice President  
Goshen Chamber of Commerce  
232 South Main Street  
Goshen, IN 46526  
574-533-2102  
nkieffer@goshen.org  
Term: 2012-2018

William Lee, IOM  
Chief Executive Officer  
Gallup-McKinley County Chamber of  
Commerce  
106 West Highway 66  
Gallup, NM 87301  
505-722-2228  
bill@thegallupchamber.com  
Term: 2014-2018

Douglas MacKay, IOM, N.D.  
Senior Vice President, Scientific and Regulatory  
Affairs  
Council for Responsible Nutrition  
1828 L Street, NW, Suite 510  
Washington, DC 20036  
202-204-7664  
dmackay@crnusa.org  
Term: 2016-2018

Robert Medler, IOM  
Vice President, Government Affairs  
Tucson Metro Chamber  
PO Box 991  
Tucson, AZ 85701  
520-792-2250  
rmedler@tucsonchamber.org  
Term: 2014-2018

Tracy L. Qualls, IOM  
President and CEO  
Choctaw Chamber of Commerce  
PO Box 1000  
Choctaw, OK 73020  
405-390-3303  
tqualls@choctawchamber.com  
Term: 2014-2018

Ed Stolmaker, IOM  
President and CEO  
Marana Chamber of Commerce  
13881 North Casa Grande Highway  
Marana, AZ 85653  
520-682-4314  
edstolmaker@maranachamber.com  
Term: 2012-2018



# WINTER

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## AGENDA

FRIDAY, SEPTEMBER 30, 2016  
10:15 A.M. - 12:00 P.M. EDT  
U.S. CHAMBER OF COMMERCE  
WASHINGTON, DC

- I. Welcome and Introductions Blain Andera, IOM
- II. Approval of Minutes Blain Andera, IOM
- III. 2017 Winter Institute Board Members/Institute Staff
  - A. Review of Strategic Goals
    - Recruit 258 overall attendees, including 94 first-years.
    - Raise \$10,000 for the scholarship fund through the silent auction and other fundraising avenues.
    - Ensure that 20% of overall attendees represent associations.
  - B. Approval of Class Advisors
  - C. Review of the Week/Regent Responsibilities
- IV. Institute Staff Update Institute Staff
  - A. Program Updates
- V. Other Business/Adjournment Blain Andera, IOM

***\*\*Remember, our Institute attendees represent associations, chambers, and other nonprofit organizations.\*\****



# WINTER

## MINUTES JUNE 7, 2016 12:00 PM EDT CONFERENCE CALL

In attendance: Blain Andera, IOM; Stephanie M. Parton, IOM, CAE; Steven Baas, IOM; Kara Beer, IOM; Steve Halter, IOM, EDFP, PCED; Rick Howe, IOM; Nick Kieffer, IOM, CP; William Lee, IOM; Duffy MacKay, IOM, N.D.; Robert Medler, IOM; Karyn K. MacRae, IOM, CAE, CMP; Shelby A. Parish, IOM, CMP; Andrew Weller; Carly Turk; Alyssa Kobernick

### I. Welcome and Introductions

Blain Andera, IOM welcomed everyone to the meeting and introductions were made.

### II. Approval of Minutes

Minutes from the March 22, 2016 conference call were approved with no changes.

### III. Staff Update

#### • Fundraising Update

- It was reported that the 2<sup>nd</sup> annual fundraising campaign, which should have hit mail boxes last month, is off to a great start. Regents were asked to encourage their classmates and colleagues to donate and were reminded that 100% of all funds donated go to the scholarship site of choice.
  - \$1,350.00 was raised last year, with \$270.00 going toward 2016 Winter scholarships.
  - \$1,440.00 has been raised this year thus far, with \$150.00 going toward 2017 Winter scholarships.

### IV. Review of Strategic Goals

The 2017 goals were reviewed. A conversation regarding recruitment and marketing took place, and regents were encouraged to focus on recruiting through personal contacts, as well as through state conferences and organizations. A reminder to include general nonprofits and to think outside the box was given. Niche chambers and diversity were also discussed.

Staff shared that the scholarship and incentive program was in the process of being evaluated and to stay tuned for more discussion at the end of the summer.

### V. 2017 Winter Institute

The group was reminded of the Wednesday – Sunday format for the 2017 schedule and was informed that registration will be live in mid-August.

After considering multiple options, regents decided to have both the speaking portion and reception portion of the opening night Kickoff in the Memorial Hall Student Union Ballroom. The Kickoff committee will discuss logistics as it gets closer to January.



# WINTER

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MINUTES  
JUNE 7, 2016  
12:00 PM EDT  
CONFERENCE CALL

Staff reported that graduation and the Big Bash will once again be held at the JW Marriott Starr Pass.

VI. Other Business/Adjournment

It was reported that the Aloft Hotel will serve as the official overflow and that the room block was open and accepting reservations.

There being no other business the call was adjourned.

***\*\*Remember, our Institute attendees represent associations, chambers, and other nonprofit organizations.\*\****



# WINTER

## 2017 SCHEDULE OF ACTIVITIES

*\*PLEASE NOTE THIS SCHEDULE IS TENTATIVE AND SUBJECT TO CHANGE\**

### Wednesday, January 4

11:00 a.m.–11:30 a.m.	Board of Regents Meeting: Marriott Hotel
11:30 a.m.–12:15 p.m.	Board & Class Advisor Briefing: Marriott Hotel
12:15 p.m.–12:45 p.m.	Board & Class Advisor Lunch: Marriott Hotel
12:45 p.m. –1:00 p.m.	Board & Class Advisor Additional Business: Marriott Hotel
2:00 p.m.–4:00 p.m.	Registration: Marriott Hotel, Lobby Level
3:30 p.m.–4:00 p.m.	Graduation Rehearsal (4 <sup>th</sup> years only): McClelland Hall, Room TBD
3:30 p.m.–4:00 p.m.	Campus Tour: Marriott Hotel, Lobby
4:00 p.m.–4:45 p.m.	Homeroom: Individual Classrooms, McClelland Hall
5:00 p.m.–7:30 p.m.	Institute Kickoff: McClelland Hall Auditorium/Memorial Hall Student Union Ballroom

### Thursday, January 5

7:30 a.m.–8:00 a.m.	Campus Tour: Lobby, Marriott Hotel
7:00 a.m.–8:00 a.m.	Registration: Institute Office, McClelland Hall
8:00 a.m.–11:30 a.m.	Core Classes: Individual Classrooms, McClelland Hall ( <i>Break: 9:30 –10:00 a.m.</i> )
11:30 a.m.–12:45 p.m.	Lunch: Memorial Hall Student Union Ballroom
12:45 p.m.–4:15 p.m.	Core Classes: Individual Classrooms, McClelland Hall ( <i>Break: 2:15 –2:45 p.m.</i> )
1:30 p.m.–2:00 p.m.	Class Advisor Meeting: Faculty/Regent Lounge, McClelland Hall
7:00 p.m.	Class Dinners

### Friday, January 6

8:00 a.m.–11:30 a.m.	Core Classes: Individual Classrooms, McClelland Hall ( <i>Break: 9:30 –10:00 a.m.</i> )
9:00 a.m.–9:30 a.m.	Class Advisor Meeting: Faculty/Regent Lounge, McClelland Hall
10:00 a.m.–10:30 a.m.	Board of Regents Meeting: Faculty/Regent Lounge, McClelland Hall
11:30 a.m.–12:00 p.m.	Lunch: Box lunches available in McClelland Hall
12:00 p.m.–2:00 p.m.	Elective Classes: Individual Classrooms, McClelland Hall
2:15 p.m.–5:45 p.m.	Core Classes: Individual Classrooms, McClelland Hall ( <i>Break: 3:45 –4:15 p.m.</i> )

### Saturday, January 7

8:00 a.m.–10:00 a.m.	Elective Classes: Individual Classrooms, McClelland Hall ( <i>Break: 10:00 –10:30 a.m.</i> )
10:30 a.m.–12:30 p.m.	Elective Classes: Individual Classrooms, McClelland Hall
12:30 p.m.–1:00 p.m.	Lunch: Box lunches available in McClelland Hall
1:00 p.m.–4:15 p.m.	Core Classes: Individual Classrooms, McClelland Hall ( <i>Break: 2:30 –2:45 p.m.</i> )
2:00 p.m.–2:30 p.m.	Class Advisor Meeting: Faculty/Regent Lounge, McClelland Hall
6:30 p.m.–10:30 p.m.	Graduation Ceremony and Big Bash: JW Marriott Starr Pass, Tucson Ballroom

### Sunday, January 8

8:00 a.m.–11:30 a.m.	Core Classes: Individual Classrooms, McClelland Hall ( <i>Break: 9:30 –10:00 a.m.</i> )
9:00 a.m.–9:30 a.m.	Class Advisor Meeting: Faculty/Regent Lounge, McClelland Hall
10:00 a.m.–10:30 a.m.	Board of Regents Meeting: Faculty/Regent Lounge, McClelland Hall
11:30 a.m.	2017 Winter Institute Concludes



# WINTER

## 2017 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

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### Class Advisors

Stephanie Parton

### Silent Auction/Fundraising

Nick Kieffer

Tracy Qualls

### Industry Consultations

Steve Baas

### Scholarships

Bill Lee

Robert Medler

Nick Kieffer

### Institute Kickoff

Ed Stolmaker

Robert Medler

Kara Beer

Karri Clark

Duffy MacKay

### Big Bash

Robert Medler

Ed Stolmaker

### Lunch Roundtable Discussions

Rick Howe

Bill Lee

Mike Hofman

### Association Dinner

Duffy MacKay (working with Jim Rogers)

### Volunteer/Faculty/Staff Dinner



# WINTER

## GEOGRAPHIC BREAKDOWN

### 2016 Winter Institute 246 Attendees from 35 states and the District of Columbia

#### State, Number of Attendees, %

Alaska,	9,	3.66%	Missouri,	10,	4.07%
Arizona,	15,	6.10%	Montana,	1,	0.41%
Arkansas,	12,	4.88%	Nebraska,	5,	2.03%
California,	5,	2.03%	New Mexico,	6,	2.44%
Colorado,	4,	1.63%	New York,	2,	0.81%
District of Columbia,	27,	10.98%	North Carolina,	3,	1.22%
Florida,	1,	0.41%	Ohio,	7,	2.85%
Idaho,	4,	1.63%	Oklahoma,	17,	6.91%
Illinois,	9,	3.66%	Oregon,	3,	1.22%
Indiana,	7,	2.85%	Pennsylvania,	1,	0.41%
Iowa,	7,	2.85%	South Dakota,	3,	1.22%
Kansas,	7,	2.85%	Tennessee,	5,	2.03%
Maine,	1,	0.41%	Texas,	28,	11.38%
Maryland,	1,	0.41%	Utah,	2,	0.81%
Massachusetts,	2,	0.81%	Virginia,	10,	4.07%
Michigan,	7,	2.85%	Washington,	7,	2.85%
Minnesota,	3,	1.22%	Wisconsin,	2,	0.81%
Mississippi,	3,	1.22%	Wyoming,	10,	4.07%

#### Top Increase Since 2015:

District of Columbia	+7
Missouri	+6
Oklahoma	+6
Virginia	+6

Most Attendees in 2015, Texas with 26

Most Attendees in 2016, Texas with 28



# 2016 Winter Institute Attendees

