

WEST BOARD OF REGENTS



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

2016 ROSTER

CHAIR

Tony Vedda, IOM, CCE
President and CEO
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214-865-6516
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Term: 2015-2016

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Term: 2015-2016

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russell.lahodny@calchamber.com
Term: 2015-2016

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abell@lachamber.com
Term: 2015-2017

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Term: 2013-2017

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Term: 2015-2017

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Association
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Term: 2010-2016



AGENDA

SEPTEMBER 30, 2016

10:15 A.M. – 12:00 P.M. EDT

U.S. CHAMBER OF COMMERCE
WASHINGTON, DC

- | | | |
|------|---|-------------------------------|
| I. | Welcome and Introductions | Tony Vedda, IOM, CCE |
| II. | Approval of Minutes | Tony Vedda, IOM, CCE |
| III. | Nominating Committee Report | Kelle Marsalis, IOM, CCE |
| IV. | Analysis of 2016 West Institute
A. Final Enrollment Report
B. Survey Results and Discussion of Institute Week | Board Members/Institute Staff |
| V. | 2017 West Institute
A. Create 2-3 Strategic Goals
B. Discussion of Week/Assign Regent Responsibilities | Kelle Marsalis, IOM, CCE |
| VI. | Institute Staff Update
A. Program Updates | Institute Staff |
| VII. | Other Business/Adjournment | Tony Vedda, IOM, CCE |

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



MINUTES

JULY 10, 2016

11:00 AM PDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

In attendance: Tony Vedda, IOM, CCE; Kelle Marsalis, IOM, CCE; Russell Lahodny, IOM; Alysia Bell, IOM; Jason E. Camis, IOM; Tony Felker, IOM, CCE; Alison Grems, IOM; Lisa Hermes, IOM; Ray Hernandez, IOM; Brad Lacy, IOM, CCE; Heidi Peterson, IOM; Marianne Virgili, IOM, CCE; Laura Grimes, IOM; Jim Johnson, IOM; Katie Stice, IOM, ACE; Karyn K. MacRae, IOM, CAE, CMP; Shelby A. Parish, IOM, CMP; Meghan Longenecker, IOM

I. Welcome and Introductions

Tony Vedda, IOM, CCE welcomed everyone to the meeting and introductions were made.

II. Board of Regents Business

- Approval of minutes
 - The minutes from the May 16, 2016 conference call were approved with no changes.
- On-site regent responsibilities
 - Regent roles and expectations during the Institute week were explained. This included, but was not limited to: information on when to arrive at University Hall every day; how they should network with attendees during meals and social functions; after-hours interaction with attendees; what to do while attendees are in class, etc.
- Regent meetings
 - Regents reviewed the schedule for meetings throughout the week.
- Visiting Homeroom
 - The group discussed visiting each Homeroom class.
- Additional business
 - Any remaining board business was discussed.

III. Class Advisor Welcome and Introductions

Kelle Marsalis, IOM, CCE welcomed the Class Advisors to the meeting and introductions were made.

IV. Responsibilities of Class Advisors

Specific Class Advisor responsibilities were discussed in detail. The first Class Advisor Broadcast was reviewed with the group and questions were answered. The role of the Regent Partner was also reviewed.



MINUTES

JULY 10, 2016

11:00 AM PDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

- V. Overview of Week
The group reviewed the schedule of activities for the week, which included a detailed review of evening events. Regents signed up for various on-site responsibilities and classes to audit throughout the week. Final enrollment and scholarship numbers were given, as well as updates on social media, fundraising, and incentives.
- VI. Joint Lunch
The group caught up over lunch.
- VII. Continuation of Week Overview
Detailed discussion of the week of events continued.
- VIII. Other Business and Adjournment
Any remaining business was discussed prior to adjourning the meeting.

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



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2017 SCHEDULE OF ACTIVITIES

PLEASE NOTE THIS SCHEDULE IS TENTATIVE AND SUBJECT TO CHANGE

Sunday, July 9

11:00 a.m.–11:30 a.m. Board of Regents Meeting: University Hall
11:30 a.m.–12:15 p.m. Board & Class Advisor Briefing: University Hall
12:15 p.m.–12:45 p.m. Board & Class Advisor Lunch: University Hall
12:45 p.m.–1:00 p.m. Board & Class Advisor Additional Business: University Hall
2:00 p.m.–4:00 p.m. Registration: University Hall, East Atrium
2:00 p.m.–4:00 p.m. LMU Housing Check-in: Xavier Hall, Room 112
3:30 p.m.–4:00 p.m. Tour: University Hall East Atrium
3:30 p.m.–4:00 p.m. Graduation Rehearsal (*4th year participants*): University Hall, Auditorium
4:00 p.m.–4:45 p.m. Homeroom: University Hall, Individual Classrooms
5:00 p.m.–7:30 p.m. Institute Kickoff: University Hall, Auditorium/McCarthy Patio

Monday, July 10

7:00 a.m.–7:45 a.m. Breakfast Snacks: University Hall, Entranceway
7:00 a.m.–8:00 a.m. Registration: Institute Office, University Hall
8:00 a.m.–11:30 a.m. Core Classes: University Hall, Individual Classrooms (*Break: 9:30–10:00 a.m.*)
11:30 a.m.–12:30 p.m. Lunch: Roski Dining Room
12:30 p.m.–4:00 p.m. Core Classes: University Hall, Individual Classrooms (*Break: 2:00–2:30 p.m.*)
1:30 p.m.–2:00 p.m. Class Advisor Meeting: Faculty/Regent Office, University Hall
7:00 p.m. Class Dinners

Tuesday, July 11

7:00 a.m.–7:45 a.m. Breakfast Snacks: University Hall, Entranceway
8:00 a.m.–11:30 a.m. Core Classes: University Hall, Individual Classrooms (*Break: 9:30–10:00 a.m.*)
9:00 a.m.–9:30 a.m. Class Advisor Meeting: Faculty/Regent Office, University Hall
10:00 a.m.–10:30 a.m. Board of Regents Meeting: Faculty/Regent Office, University Hall
11:30 a.m.–12:30 p.m. Lunch: Roski Dining Room
12:30 p.m.–2:30 p.m. Elective Classes: University Hall, Individual Classrooms

Wednesday, July 12

7:00 a.m.–7:45 a.m. Breakfast Snacks: University Hall, Entranceway
8:00 a.m.–10:00 a.m. Elective Classes: University Hall, Individual Classrooms (*Break: 10:00–10:30 a.m.*)
10:30 a.m.–12:30 p.m. Elective Classes: University Hall, Individual Classrooms
12:30 p.m.–1:00 p.m. Box Lunch: Outside of Roski Dining Room
1:00 p.m.–4:30 p.m. Core Classes: University Hall, Individual Classrooms (*Break: 2:30–3:00 p.m.*)
2:00 p.m.–2:30 p.m. Class Advisor Meeting: Faculty/Regent Office
6:45 p.m.–7:15 p.m. Graduation Ceremony: TBD
7:30 p.m.–11:00 p.m. Big Bash: TBD

Thursday, July 13

7:00 a.m.–7:45 a.m. Breakfast Snacks: University Hall, Entranceway
8:00 a.m.–11:30 a.m. Core Classes: University Hall, Individual Classrooms (*Break: 9:30–10:00 a.m.*)
9:00 a.m.–9:30 a.m. Class Advisor Meeting: Faculty/Regent Office
10:00 a.m.–10:30 a.m. Board of Regents Meeting: Faculty/Regent Office
11:30 a.m.–12:30 p.m. Lunch: Roski Dining Room
12:30 p.m.–4:00 p.m. Core Classes: University Hall, Individual Classrooms (*Break: 2:00–2:30 p.m.*)
4:00 p.m. 2017 West Institute Concludes



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2017 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

Class Advisors

Brad Lacy

Silent Auction/Fundraising

1. _____

2. _____

3. _____

Industry Consultations

1. _____

2. _____

Scholarships

1. _____

2. _____

3. _____

Institute Kickoff

1. _____

2. _____

3. _____

Big Bash

1. _____

2. _____

3. _____

Volunteer/Faculty/Staff Dinner

1. _____

Lunch Roundtable Discussions

1. _____

2. _____

Social Media Strategy (Optional)

1. _____

2. _____



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GEOGRAPHIC BREAKDOWN

2016 West Institute

117 Attendees from 31 states and the District of Columbia

State, Number of Attendees, %

Alaska,	1,	0.85%	Montana,	1,	0.85%
Arkansas,	9,	7.69%	North Carolina,	1,	0.85%
Arizona,	1,	0.85%	Nebraska,	2,	1.71%
California,	26,	22.22%	Nevada,	2,	1.71%
Colorado,	5,	4.27%	New Jersey,	1,	0.85%
Connecticut,	1,	0.85%	New Mexico,	3,	2.56%
District of Columbia,	5,	4.27%	New York,	2,	1.71%
Idaho,	1,	0.85%	Oklahoma,	3,	2.56%
Illinois,	2,	1.71%	Oregon,	4,	3.42%
Iowa,	2,	1.71%	South Dakota,	1,	0.85%
Kansas,	3,	2.56%	Tennessee,	1,	0.85%
Kentucky,	1,	0.85%	Texas,	24,	20.51%
Louisiana,	2,	1.71%	Virginia,	2,	1.71%
Michigan,	1,	0.85%	Washington,	2,	1.71%
Minnesota,	1,	0.85%	Wisconsin,	2,	1.71%
Missouri,	3,	2.56%	Wyoming,	1,	0.85%

Top Increases Since 2015:

California +9

Texas +2

Arizona, Connecticut, Michigan, Missouri, North Carolina, Nebraska, Nevada +1

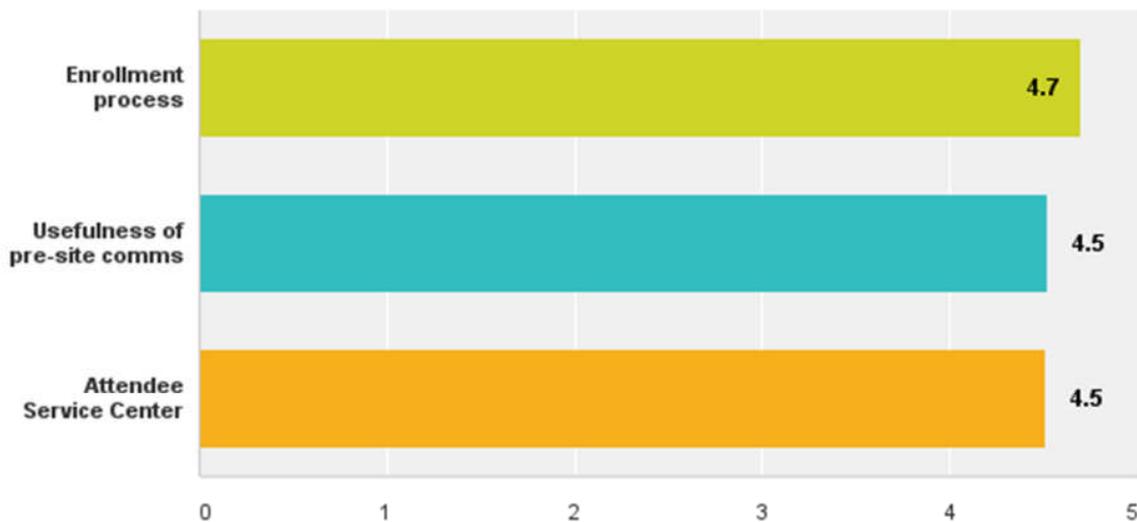
Most Attendees in 2015, Texas with 22

Most Attendees in 2016, Texas with 24

ATTENDEE SURVEY RESULTS AND FEEDBACK

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

Answered: 77 Skipped: 1



Additional comments about registration and communication*:

- I felt like communication went out a little late this year.
- Unable to change electives in service center.
- Didn't use Attendee Service Center.
- Wish more instructors posted their content before, during and after Institute.
- My email(s) had bounced back to IOM and I did not receive information on scholarship open period which was disappointing.
- Enrollment is very simple, which is good.
- I feel registration itself was easy, but communication both during registration and prior to Institute week were lacking. I had to send quite a few emails to get detailed information about housing, parking, the schedule, etc. Especially for first years, the schedule did not make clear what was mandatory and what was optional on Sunday. Giving us a Schedule of Activities showing everything taking place during the week is not helpful if it doesn't specify what things you should plan to attend and what things don't apply to you.
- Just fine. Not excessive, but practical in timing and frequency.
- Thank you to Katie our advisor.

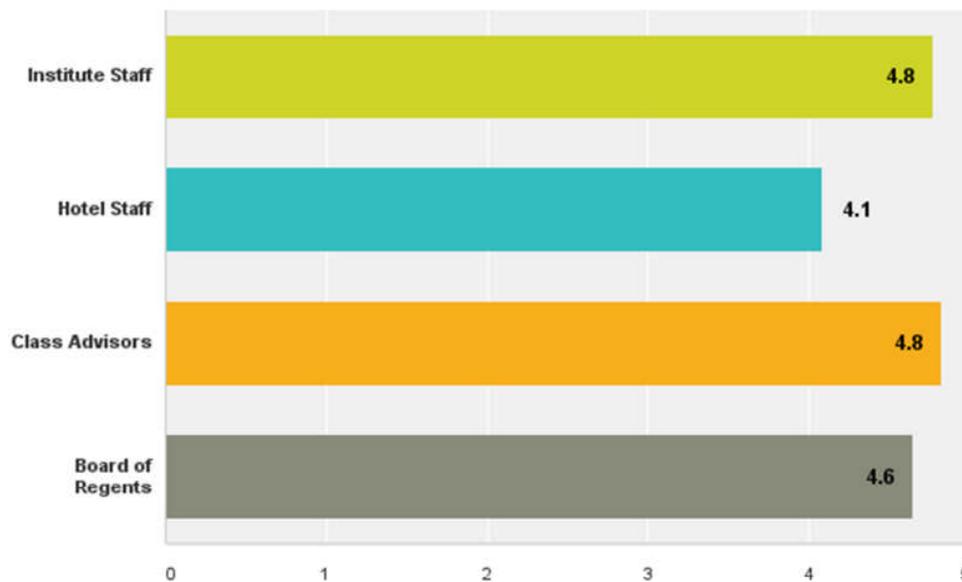
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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q5 Customer Service

Answered: 77 Skipped: 1



Additional comments about customer service*:

- Everything was great again this year. I appreciated being able to move in dorm on Saturday.
- Most of board of regents were very approachable, several seemed a little stand offish.
- Didn't stay at Four Points.
- Had great success and unexpected success with the "consultation" process. Kudo's for offering this.
- Hotel would not permit check-in before 3, making half of our class late for homeroom. After waiting an hour for help, my friend loaded her baggage on a hotel cart and dragged it to an elevator, when a bell cap (Farood?) saw her and dragged it back to the concierge stand, and was rude about doing it. During the fire alarm, staff seemed unaware of what was going on and unprepared, and communication was poor.
- The Institute staff, class advisors and Board of Regents are a great group of professionals to be around. They provide inspiration, support and truly made the week a success. The hotel staff was also very accomodating.

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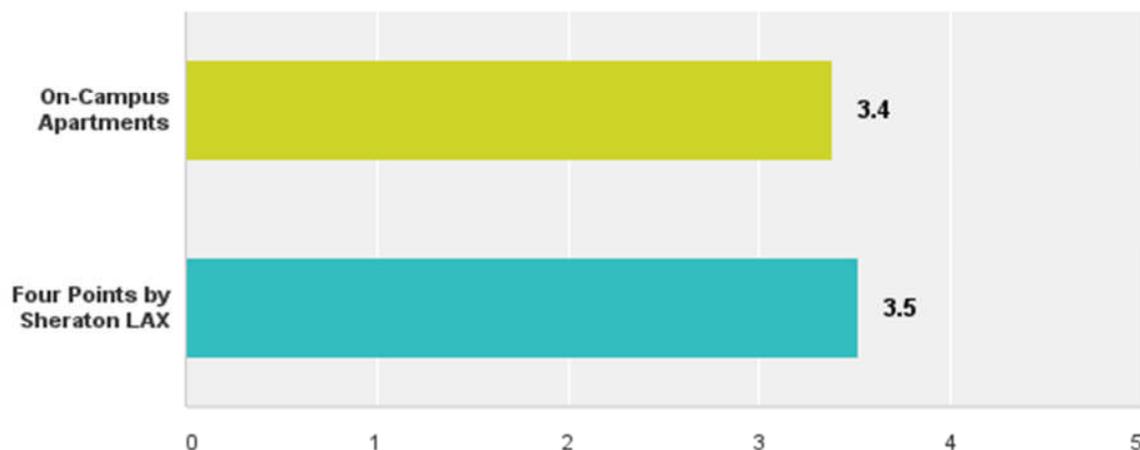
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ATTENDEE SURVEY RESULTS AND FEEDBACK

- By "Institute staff," I am referring to those who taught the classes because I didn't see "faculty" listed anywhere else. Having the same teachers each year is good for continuity, but I believe the content may suffer as a result. It sometimes results in the telling of the same stories and the presentation of only one viewpoint. I believe more variety would be beneficial. Additionally, many of the instructors appear to simply plug in the words "Chamber/association" into their presentations and concepts rather than actually tailoring the content to chambers and associations. The classes taught by professionals who currently work in a chamber or association are the most engaging. I believe that instructors who work in the fields will give Institute the edge over other conferences. If attendees simply want broad strategies and principles that are applicable to all professions, we have a number of options. But content that is specific to chambers and associations will keep the students more engaged and more likely to return.
- Always visible. I had no need to reach out to them as I would go to my class advisor first.
- I stayed in the dorm and would not do that again.
- When I had many questions prior to Institute, the staff tried their best to respond and were very timely. Unfortunately, a lot of information wasn't available until closer to Institute week, which doesn't help for those of us who are planners. It would be much more helpful to have these details available more than a few weeks prior to Institute.
- You guys Rock!

Q8 How would you rate your accommodations?

Answered: 76 Skipped: 2



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ATTENDEE SURVEY RESULTS AND FEEDBACK

Additional comments about accommodations*:

- Huge improvement over the Custom Hotel in 2015. I would be happy to stay at Four Points again.
- Improvement from The Custom, but still quite an old property with inadequate bathrooms.
- The hotel was fine. The food was excellent. The only drawback was the location not being central to other amenities, dining, or shopping options.
- The sheets are paper. Weird!
- Had something stolen from room.
- I prefer the Doubletree hotel we all stayed at my first year at Institute.
- Many rooms were not ready for attendees to check-in, but everything went smoothly once checked-in.
- The hotel accommodations were much better than last year!
- I prefer to have the choice of walking to campus. I didn't like being so far and dependent on bus transportation to go to and from.
- Didn't get what was requested and registering a complaint was not well received by front desk or management team.
- Only perk was that on-site parking was \$15 a day.
- I have been underwhelmed with the hotel selections the past two years. When I arrived on Sunday the check-in line was very long with only two staff people working. Also, my air conditioning never functioned properly - even after calling hotel maintenance staff to my room three times. The room was OK but I would never stay here if I didn't have to.
- I did prefer this hotel to the Custom, however, I do miss the convenience of being closer to campus.
- Too far to walk to campus.
- This hotel was preferable to the Custom. The location was not as convenient, but it was still worth the extra driving time to have nicer accommodations.
- O'Malley in the future please, they have microwaves.
- The service in restaurant area was borderline bad. People acted like they hated their job.
- Things were broken in the room, no hot water on last night and the staff handled poorly.
- Hotel was nice, but too far to walk to anything.
- Having recently stayed in a dorm room in Texas, I expected much of the same. I was mostly disappointed that the sheets that I paid for were "recycled" paper (not just "thin", as was stated in e-mails received). When I paid for the sheets, I was under the impression that they would be cloth. I also had what I thought were reasonable expectations (based on the previous dorm stay) of getting bar soap, towels, hand towels and washcloths for the week. There were no hand towels (which I assume the paper towels were to suffice) and no washcloths. Had I been told this, I would have packed some since that is a personal preference.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Low-quality linens, no kitchenware. Inconvenient parking and check-in process. I was in a building without other institute attendees.
- I chose not to stay at the hotel due to the distance from campus and the negative reviews on Trip Advisor regarding cleanliness and quality, in addition to negative first-hand knowledge from colleagues. Also, on-campus housing information came out after I had already made reservations elsewhere.
- Apartment was great. Paper bedding, not so great.
- I recommend a checklist be sent to people staying in the dorms to help them plan for what they will need to provide for themselves. Also, the so-called linens were not very nice. Given a little warning, I probably would have foregone the charge and simply brought my own. Not a big problem but something that could be improved.
- Dorm buildings were very nice, but the mattresses/disposable linens were awful.
- Not in a good location.
- The hotel was much better than the custom (clean!) but it was inconvenient that there were not any stores within walking distance. Just a grocery store or drug store would have been great.
- The hotel was fine, just wish it was closer to Loyola Marymount. It is nice to have the option to walk to class.
- They took the microwaves out of the On Campus Apartments. That was a disappointment. The bedding are still terrible. Everything else was OK.
- Great upgrade from the Custom, though refrigerators in the room would have been nice. I know we all used them a lot last year.
- I had some minor issues. TV didn't work. It took them two hours, but they finally switched rooms. Room service issues as well. Overcharging and forgetting items. Staff was friendly though.
- The Sheraton was pretty tired looking (and having a roach in our bedroom was not pleasant). I didn't enjoy being so far from campus, I missed having the opportunity to walk to and from class. Looks like there is a Marriot, Double Tree and Courtyard nearby. Would it be possible to go to one of those hotels next year?
- Better than last year. Just wish there was things in walking distance like a grocery store etc.
- Rooms were spacious and clean. However, our showerhead had to be replaced, and the linens were less than impressive, more like paper.
- The hotel was nicer overall but the walk ability was terrible. As much as I disliked the Custom, I would rather be there so I can walk to class and not have to be on a specific bus schedule.
- Would prefer for hotel to be in a safer area.

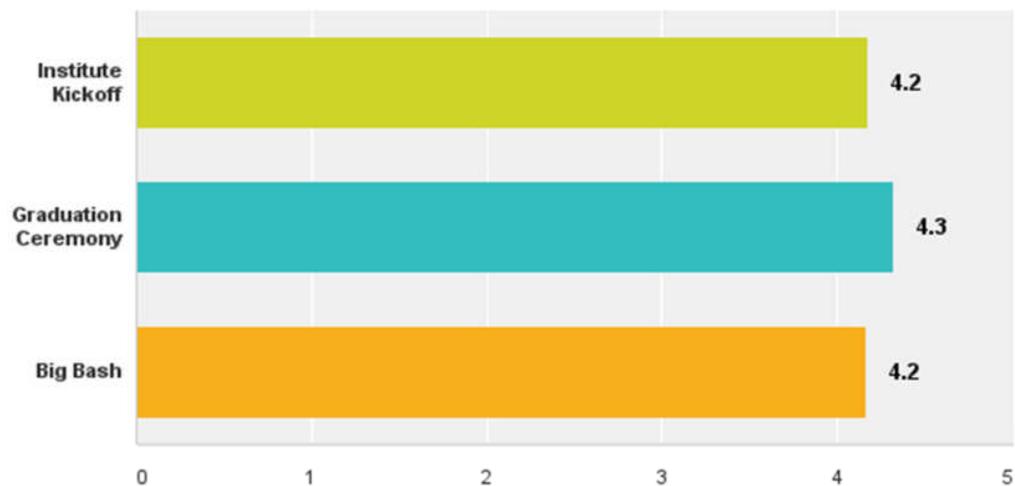
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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q10 Please rate your experience at the following Institute events.

Answered: 75 Skipped: 3



Additional comments about Institute events*:

- I had fun at every event. I hope that big bash is something different than boat next year.
- The harbor cruise is nice but it gets old after awhile. i would love to have an opportunity to celebrate graduates at a different venue next year.
- I would have the Big Bash night on Tuesday night and class dinner on Wednesday night.
- Being stuck on a boat until 10:30 at night really wasn't the best time.
- The Institute Kickoff was a lot of fun. The food was great, and I liked the Family Feud game. And it didn't go on too long, although it could have and I wouldn't have been bothered by it.
- The graduation ceremony was nice. It'll be neat to have a slideshow showing photos from the graduating class's four years at West Institute.
- The Big Bash is always fun once the meal is over. I enjoy the dancing and live auction. However, the tight seating makes it difficult to move around and talk to people who are not seated next to you. And, the fact that it's a boat ride forces people to stick around during the entire trip when the festivities actually end before the trip is over (for those who aren't dancing anyway). Finally, the food was not good at all. I feel bad for the guests who had to pay \$75 for a ticket. The green beans were undercooked, and the chicken topped with spaghetti sauce was laughable. The atmosphere made it worth it, but I wouldn't be opposed to a venue change altogether. Also, it'd be neat if classes started about an hour later the following Thursday to make up for the late night.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- It may be time to try something other than the boat!
- Graduation Kickoff might be better suited to have brief industry related presentations. The wealth of knowledge at IOM is a plus, and to learn and spend time with the professional presenters is why I'm there. Creating a team building atmosphere and unity within each class could be done in homeroom.
- Would be OK if Big Bash was onshore in 2017.
- The class party was very expensive and we were not able to have separate checks. Both these make it very hard to expense the meal.
- The kickoff is fun, but it is difficult to engage all members of the class because games only require a handful of participants. The Big Bash is also a great experience, but I know it is challenging to get all class members to participate.
- Hoping for something different than the boat next year. Food was not great the past two years.
- Big Bash -- really too noisy to converse. Boat was a good thought, but too far from shore and darkness took away from the event. Sub-par meal. I'd recommend going back to land.
- Family Feud was fun but the space wasn't quite right for that kind of entertainment. Love the view from the buffs. Great energy and food/drink.
- The food at the kickoff event was very good.
- Not everyone does boats.
- Thanks to uber I did not make the last 2.
- The boat was a terrific time, well organized, and encouraged all classes to get to know one another.
- The graduation seemed not very special since it was held separate from the Big Bash. The yacht was nice but if you didn't want to dance, there wasn't anything else to do as it was hard to visit with anyone with how loud it was.
- I was only able to attend the first 15 minutes of Institute Kickoff due to communication issues. I emailed two people regarding Sunday's schedule and the only responses I received were that registration was from 2 pm - 4 pm and that I might want to attend pre-homeroom at 3 pm. Due to this, I made plans to check into my housing at 4:30 pm and then made dinner plans for 6 pm. Thankfully, I was able to push off check-in to 5:30 pm and was still 30 minutes late meeting for dinner. For future sessions, especially for first years, please make the schedule much clearer as to what is required attendance, especially on Sunday. Just FYI, for those of us used to attending professional conferences where registration is on Sunday and the first session is on Monday, all Sunday activities are optional.
- The food at big bash was very disappointing.
- Heard lots of comments about not wanting to do the boat tour again and the food was HORRIBLE.
- Wouldn't mind having our class big bash on the boat. Anywhere else, my concern would be people would leave early.
- Yacht is nice, but food should be available upon arrival and the yacht should dock after the first hour so those who want to leave earlier than 10:30 can do so. You can require that we be in class at 8am but it's not fair to require that we stay up late at night.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Can we have a different venue for the Big Bash? The food was terrible and many people didn't go because they didn't want to feel "trapped" on the boat.
- I was not able to attend Big Bash this year.
- The food on the boat was terrible. We all ended up going out for a burger afterwards. The boat experience is nice, but a bit lengthy.
- The kickoff and big bash could use some new ideas.
- Can the Big Bash change or does it need to stay the same for next year? Something at the hotel that most of stay at would be nice (and if it's walking distance it would be easy for those staying at the dorm to get to). Or a tour of LA could be a neat option!
- Would like to see the Big Bash at another location every other year. Too confining.
- I get sea sick and can't go in the boat. So I missed the past two years.
- All were well done. Sorry to hear that some people did not like the idea of being "trapped" on a ship for three hours, I thought it was a lot of fun. For next year, it might not hurt to have guests briefly review the ship's safety evacuation procedures, just in case.
- The big bash is fun. I really enjoy the boat. I think it's something that is unique to West. I'd be upset to see it leave.

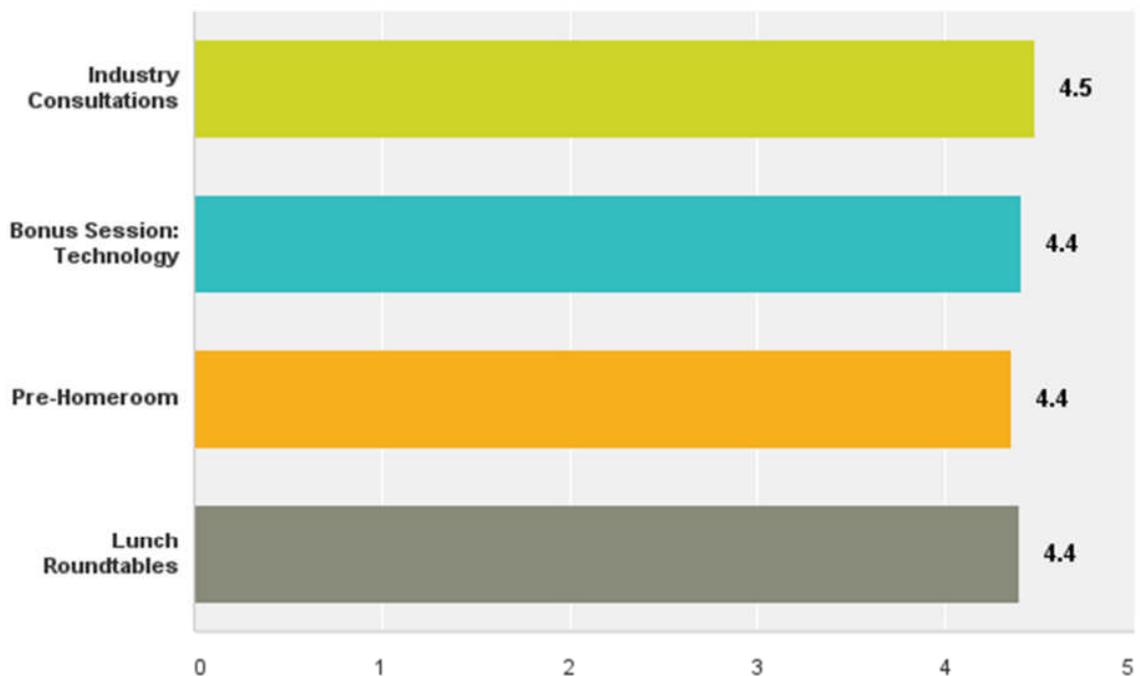
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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q12 Please rate your experience participating in additional learning opportunities.

Answered: 75 Skipped: 3



Additional comments about learning opportunities*:

- Very beneficial information/consultation about accreditation.
- Action plans and procedural implementation plans were in short supply this year. Actual step by step checklists and action plans are very helpful to getting things done... less abstract, more clear paths.
- I like the roundtable discussions, but did not attend any this year. One reason was because I needed sunshine after being in the classrooms all morning. Is it possible to host one or two outside in the courtyard?
- I didn't participate in the lunch roundtables last year and found them extremely beneficial and informative.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

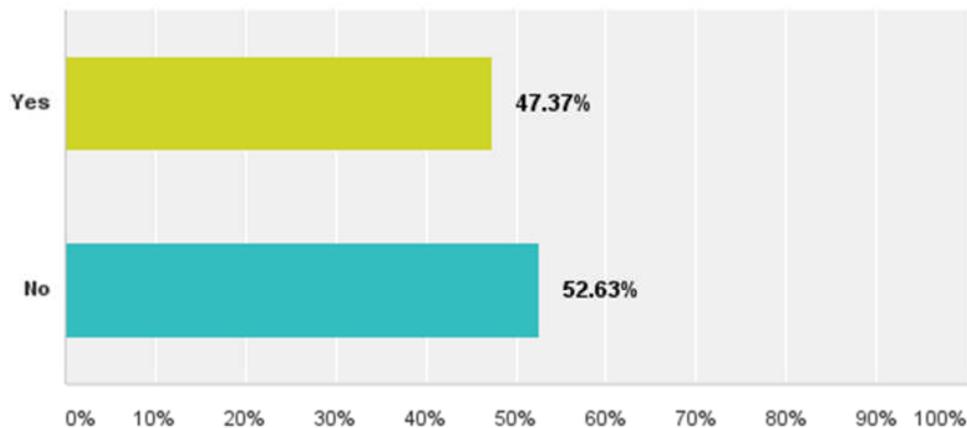
- The Pre-Homeroom prepped me for the week. I did not participate in round tables only because I was a little burned out from everything else.
- I did not have the opportunity to take advantage of the industry consultations and Bonus Tech session. My awareness of these was rather low.
- I wanted to attend the DOL lunch roundtable on Thursday, but by the time I used the restroom and grabbed my food, the table was full and they were well into their conversation. Can these be scheduled 15 minutes after lunch begins?
- I didn't see much difference between the information given at pre-homeroom versus homeroom, so I felt it was just time filler.
- Also, while I was grateful to have an industry consultation, there wasn't much information given prior to signing up, so I was confused as to what we could use the consultation for. Examples would have been helpful. Actually, descriptions of all Sunday sessions would have been helpful.
- Can we have a course on Young Professional programs? Or Workforce and YP programs? I think with the millennials being 77% of the workforce in 5 years it's an important topic and I find that a lot of people want to discuss their YP programs.
- Maybe survey attendees about top 3 topics they want to discuss and organize roundtables inside and outside.
- More association round tables would be great.
- Lunch roundtables were exceptionally helpful.
- Would have been nice if there were Roundtables focused on Association groups, as well. Would have been a nice opportunity for Association professionals to network outside of their class and meet each other.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q16 Did the convenience of being able to bid away from the physical auction increase your rate of bidding?

Answered: 57 Skipped: 21



Additional comments about the silent auction*:

- The registration and bidding process was a little confusing at first, but it was easy once I figured it out. I liked the ease of online checkout the best.
- It was great being able to sit at the dinner table and bid on items of interest.
- I accessed Bidr but did not actually bid. I probably would have bid had the app showed the most recent bid and not the minimum bid. I was apprehensive about bidding when it was possible that I was out-bidding an amount I couldn't afford. This information might have been revealed after I selected "bid," but I didn't want to risk it.
- I thought it was great. I didn't bid on anything, but I plan to next year. Our group made some donations to the auction and I loved when those who won the baskets came to tell me about it. Another great opportunity for interaction.
- I would have perused the items, but am repulsed by the bidr system.
- I looked at items but didn't know when the auction concluded.
- Everyone at our table had fun comparing and talking about the auction.
- I was skeptical at first, but after getting set up it seemed to go well (and bidding picked up when you could see items). That said, would have been nice to have better descriptions on some of the items (expiration dates on travel is a must).
- Maybe look at other vendors.

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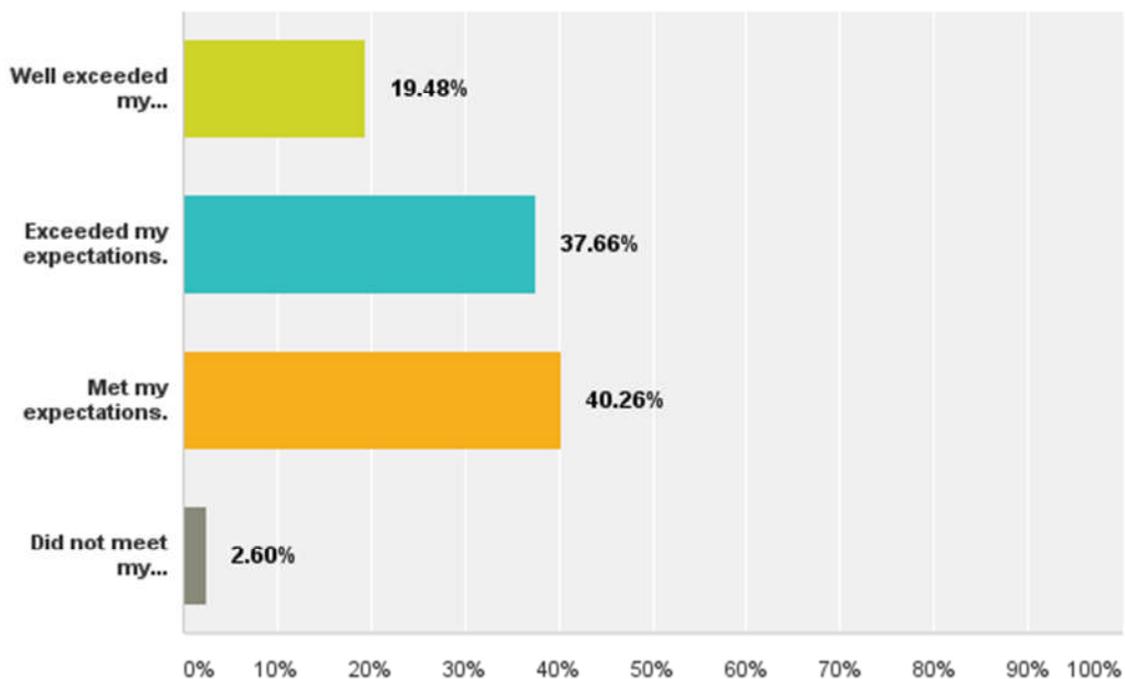
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ATTENDEE SURVEY RESULTS AND FEEDBACK

- I was skeptical at first about not using hand written bidding sheets but the app was extremely easy to use.
- Seeing the last bid amount would have been helpful.
- Kellie did a great job with the auction. I loved that there were no long lines to wait in.
- I did view items on the yacht, just didn't bid but would have loved to. Bidr seems nice, but wish you could find items easier (numeric or alphabetical order).
- Loved the use of the online bidding.

Q22 Overall, to what extent did Institute meet your expectations?

Answered: 77 Skipped: 1



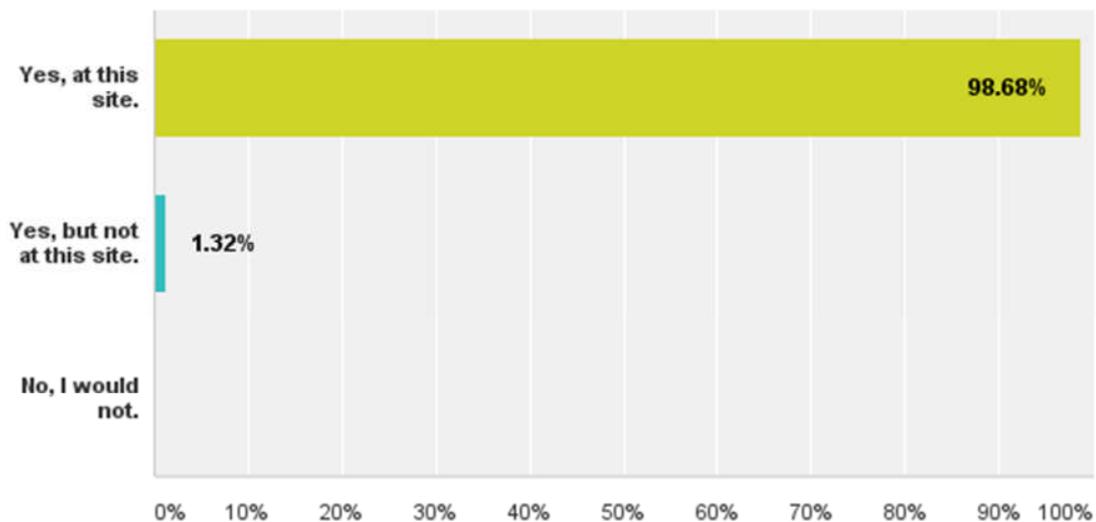
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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q23 Would you recommend Institute to other nonprofit professionals?

Answered: 76 Skipped: 2



In an effort to enhance our curriculum, we want to know what you want to learn more about. Please list any topics not covered at Institute that you'd like to learn more about.*

- Your topics are very good topics. The content of most of my courses was very basic for everyone and did not seem well-prepared for a group of industry executives.
- I don't think there was anything that wasn't covered. Some of the electives were more useful than the core and I wish they had been a bit longer. The leadership core class for first years was particularly weak only because it was a topic that it seemed most people had already heard many times before the Institute experience.
- Publishing (content curation vs. original content, copyright issues, legal considerations to creating original works or works for hire, etc.).
- Leadership.
- There were plenty of interesting topics to choose from. I had a hard time deciding between them. I think topics are great-a couple could use better teachers.
- Understanding that all attendees are not at the same level, having some classes at varying levels-particularly core curriculum would be helpful.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Technology implementation. Rather than an overview of technology use implementation. I can tell that directly endorsing products is avoided... it is helpful when step by step processes using specific software and platforms are demonstrated. For example; instead of "Using video to increase engagement" ... demonstration how to take, cut, and implement video within commonly used platforms i.e youtube, facebook, constant contact. Don't tell me I should, show me how I can do it.
- I'm not even sure how you would do this, but what if during the first homeroom the class designed its own session to be held maybe on the last day? Our second-to-last session could easily have been replaced by something more self-directed.
- Access to free resources, i.e., how to get "free" press coverage/social media; worthwhile sponsorship trades, affinity programs, etc.
- I don't know how it could be included in the week but would enjoy and appreciate seeing some time built in to brainstorm with my class. I took home some practical ideas that we are already implementing thanks to discussions during classes.
- As I mentioned on the previous page, topics and content that are more narrowly tailored to chambers and associations would enhance the experience. It's obvious when instructors are giving the same presentation that they have given hundreds of times to all different groups without really changing any of the content other than simply adding the words "chambers/associations".
- There is a lot of focus on Chamber marketing and member development, but little for trade associations. Also would like to see more on component relationships, chapters and governance issues. A very valuable course could also be created from the "Race for Relevance" book by Harrison Coever and Mary Byers.
- As a first year I understand certain core courses are required. However, some were very juvenile including the Communications class and the Leadership Class. Most of us are already in a professional environment and know the qualities of a leader and how poor communication effects an organization. It was more of a vocabulary session as opposed to a problem solving approach. Finance was awesome. Actually useful material. Governance also was a good one. HR was good too.
- The curriculum is not as beneficial to associations as it is to Chambers. I would send members of my staff, if the curriculum concentrated more on association management. Most instructors for the classes treated associations as an afterthought.
- Project management tools.
- We covered this for just a few minutes in the governance class, but I'd like to have more focus on legal and financial compliance/requirements of c(6)'s. How long do we keep documentation? Which documentation? What forms are we required to fill out for federal/state compliance, etc.? Also, the DOL roundtable topic should have been part of a class. I also found the marketing and social media content to be at a very beginner level. We expect our interns to have that level of knowledge when they start at our organization.
- Specific association classes; felt the curriculum was chamber biased even more so this year.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Not everyone at Institute is a President of the organization. Classes like dealing with difficult employees, for example, had no instruction for dealing with difficult or absent co-workers or higher levels such as a president or board. The class assumed you were the president managing downward.
- Not everyone is the CEO or President of their chamber. Should have more classes that address different staff levels.
- Round-table learning - getting ideas of what's worked and not from our peers (can be various topics).
- I know you work hard to have presenters address the needs of both Chambers and Associations. I appreciate that....I think sometimes they need to simply break the class into Chamber & Association groups so the peer to peer discussion are among similar organizations. I'm not saying all the time, but presenters sometimes are trying to fit a square peg topic into a round hole. We come to IOM to learn from our peers.....sometimes dividing us up by our organization type would be OK. There's ample time that we are all together. Thanks!
- I think it would be practical to offer some sort of opportunity to review elevator speeches for our businesses.
- The fourth year curriculum could use some updates. Some of the classes were at a first or second year level.
- Young Professional programs. Both Associations and Chambers have these programs and it would be nice to have a platform to discuss these programs and gain insight on how to improve them.
- Instead of basic marketing go deeper. Social media strategies. Marketing on a shoestring budget. Innovative new ways.
- Maybe, strategies for dealing with difficult members and community leaders.

Additional comments about Institute*:

- Aaker, Lacy and Hall were great and informative. The marketing and event planning classes were a waste of 3 hours. If you are going to make these classes mandatory, they need to be focused on content that is challenging and even cutting edge. We were asked to cut pictures out of magazines and paste on the wall.
- I feel IOM is very much geared toward chamber professionals. As an association professional, I can take away themes and ideas, but I would not recommend IOM to my association colleagues.
- Institute is a lot to take in as a 1st year student. As you progress through your years at Institute, deeper dives into subject matter would be valuable as would more opportunities to exchange freely with peers -- perhaps an open forum where anyone can put a problem/issue/concern out to the group for feedback and problem-solving.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Thanks for another great year. Food was very good. My only complaint was the lack of air conditioning in our homeroom. This made some of the classes very uncomfortable and impacted the ability to concentrate. The homeroom for our 3rd year class was on the small side. Loyola has other much bigger, more spacious rooms that would have been more comfortable for all of us.
- If only all the speakers could be as good as David Aaker!
- This was a good experience and I did take away some great ideas. On a personal level I did learn that if you want to connect with your classmates you have to attend the events in the evening.
- More class time to share and discuss actual "issues" classmates might be having in their current positions.
- My class was wonderful, and I look forward to the next 3 years with each of them. Looking forward to a future in the professional world with them. Thank you for the wonderful experience!!! In addition, the food/snacks were great, and the campus at IOM was amazing. The curriculum was spot on. I look forward to more!
- I had a very negative experience last year and was reluctant to come back to Institute. I'm glad I gave it a second chance. While some of the classes were a bit redundant and unnecessary, the overall experience was worthwhile.
- My experience has been an incredible growing experience for my professional development. Thanks for all of your efforts.
- Mostly enjoyed the presenters and speakers, and staff were patient and helpful, especially to the technologically-challenged. Saw one couple at the Big Bash sitting alone at a table for 8 and felt bad for them. Of course, i could have been the one to invite them to my table, so i guess that's on me, too. / I could not have attended Institute without a scholarship and am grateful to that commitment to professional development. I am grateful and definitely will pay it forward.
- Fix the AC.
- The third year class was stuffed into a tiny classroom with desks. Please please don't make us sit in desks in a cramped classroom with no air conditioning all week again.
- There were two outlets in our classroom for 40 people. Please either provide us with a room that we can charge our devices in OR provide us with electrical outlets.
- When the food staff at the school wheel the soda and snack trays through the lobby of the school it is exceptionally loud and disruptive.
- Again, please no desk style seating. So uncomfortable. Room 3999 is the best room I've been in - can we have more like that?
- Overall, I enjoyed the experience this year. I look forward to next year.
- Thanks for such a great opportunity! I appreciate that our class was asked about graduation and the yacht. I just want to add that I am sure that whatever the Board of Regents and Institute Staff decide will be fantastic! The yacht is great; however, if there are attendees who can't be on a boat let's find a great place and celebrate being at Institute. Thanks again, I do hope I will have the opportunity to remain involved with Institute after graduation. It is a wonderful program!

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- The lecturers can make or break a class. Some lecturers were excellent, providing valuable expert content presented in an engaging manner. Others were painful to listen to for 3 hours which is frustrating when you're captive and ready to learn but get little to no value out of the session. I recommend spending more time vetting the speakers and prioritize the speaker over the topic/curriculum.
- It would be great if all classes had at least 1/4 of the time dedicated to in-class facilitated peer-sharing activities and discussions - that is where I learned the most. It's also important for the speaker to be a good facilitator such activities - one that gives clear instructions to meaningful exercises.
- Most classes I found to be very good with the exception of the marketing class. The Is it Legal class was good but the elective "Executive Law" was just repetitive information so I found that the time spent there was basically for naught.
- My only complaint is the structure of the week. Why do a half day on Tuesday? Do a full day and give us a half day on Thursday. You encourage us to hand out on Graduation night and yet ask us to be fully attentive on a full day of curriculum. I felt terrible for my instructors as half of us were falling asleep. Even getting off the boat at 10:30 leaves you going to bed closer to 11:30pm. Up at 6am to get ready and catch a bus. You need to promote wellness as well and responsible behavior at a professional organization. Not saying to remove the party but allow those who want to be respectful the chance to choose how late they participate with reasonable time to sleep. Again, it was a great time but Thursday was a complete throw away day for me.
- I really love the idea of the program for Institute. The camaraderie that is generated by the class advisors, and home room is wonderful. I would attend again next year, if there was more content relevant for associations and if the courses were more challenging.
- The governance, finance, and HR class content was great! What should have been the most boring classes were the most interesting - and the most applicable. All of the Leadership Outfitters classes, with Steve and Jill, were also very useful and applicable.
- I found the marketing and membership classes to be very basic. A lot of the content was also focused on smaller communities. Quite a few of the marketing and membership strategies mentioned aren't applicable to large cities or organizations in larger metropolitan areas. There was also a lot of focus on practical examples, which I appreciate, but I think there should also be a place for strategic marketing tactics.
- I'm curious why the Institute isn't held at a hotel with appropriate conference facilities. The campus seemed inconvenient, and with many class cohorts staying in different locations, it diminished the opportunity for bonding and networking.
- Laura Grimes is amazing, great 1st year adviser.
- I believe there would be some value in having a class advisor for more than one year.
- I would recommend putting a class after registration on Sunday --instead of kick-off that a lot of people skipped or left early at this year. I'd rather get a class in and be able to catch an earlier flight out on Thursday. That would help our budget too or having to take a red eye out.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- During classes that are more chamber based, have association people group up to share experiences and ideas.
- It seems like all the classes are aimed at CEO's. Have a class about ambassador programs, ribbon cuttings, specific ways to work on member retention, etc. Real world things rather than broad 'how to run a chamber.'
- I always have a great experience at Institute, but this year I felt some of the instructors didn't stay on topic. I think there should be more details about what the instructor will cover. For instance, I took "Strong chambers of the future" as an elective and thought it would discuss how my chamber could stay ahead of industry trends. The instructor did not talk about trends at all, but explained how your chamber or association could stay strong with a good leader and staff. It was good information, but not the reason I took the class.
- I would suggest you tell the people staying in the dorms to bring their own sheets. I packed my own and the beds were just fine but friends of mine purchased the linen package and they were very disappointed with the "paper" sheets given. I really enjoyed the dorm experience, getting to know my classmates outside the classroom was a lot of fun!
- I enjoyed and benefitted from my second year at IOM West and look forward to being back next year. Keep up the great work!
- I had two really horrible classes this year. I know the instructors have a long-time relationship with Institute, but in the interest of the participants, it's time to get rid of them. I love Institute. I love my classmates. And I love the lessons that normally come when I attend. But if I had those two faculty last year, I might not have come back. Lazy teaching at its finest.
- Classrooms: Open discussions and exchange of ideas are key to our learning experiences, so a room set that helps foster that interaction is important. If we are stuck in a classroom with single desk chairs, try a set up that is like a herringbone or chevron classroom at least.
- I would suggest a core class on professional conduct and appearance.
- Most of the classes were great and packed with good information. The class on Communicating with Confidence was only fair, and the class on Strategic Communications was, I thought, very weak. The presenter was not very good and she did not have much content, and hardly anyone in the class was paying attention to her. Overall, however, the Institute was a great experience and I highly recommend it for others.
- You guys are great. Thank you.

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