

CURRICULUM COMMITTEE



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

AGENDA

SEPTEMBER 29, 2016

9:00 A.M. - 12:00 P.M. EDT

U. S. CHAMBER OF COMMERCE
WASHINGTON, DC

- I. Welcome and Introductions
Megan A. Lucas, IOM, CEeD
Chair, Curriculum Committee, Institute for Organization Management
Chief Executive Officer and Chief Economic Development Officer, Lynchburg Regional Business Alliance (VA)

- II. Approval of Minutes
October 8, 2015 Meeting

- III. Curriculum Overview
 - Benchmarking Documents
 - 2016 Updates
 - Class Updates
 - Curriculum Recommendations

- IV. Additional Business

- V. Adjourn
Next In-Person Meeting: October 5, 2017, Washington, DC

CURRICULUM COMMITTEE



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

2016 ROSTER

CHAIR

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Term: 2011-2017

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Term: 2012-2016

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Term: 2015-2017

CURRICULUM COMMITTEE



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

MEETING MINUTES OCTOBER 8, 2015 9:00 A.M. - 12:00 P.M. EDT U. S. CHAMBER OF COMMERCE WASHINGTON, DC

In attendance: Robert E. Thomas, IOM, CAE, CMP; Megan A. Lucas, IOM, CEcD; Blain Andera, IOM; Jeremy L. Arthur, IOM; Brian Baker; Christin W. Berry, CAE; Ali Crain, IOM, CCE, ACE; Catherine S. Dority, IOM; Teresa Eyet, IOM; Mark L. Field, IOM, CCE; Robert J. Foulks, IOM, CAE, CPA, CGMA; Kellie K. Lowery, IOM, CAE, CPA; Matt R. McCormick, IOM, CCE; Timothy M. McKee, IOM; Crystal Moore; Matt G. Pivarnik, IOM, CCE; Chris E. Wallace, IOM, CCE

Observers: Kimberly Dahlsten, IOM; Kimberly Guida, IOM, CAE; Dan Lemyre, IOM, CAE; Kelle Marsalis, IOM; Kimberly Nastasi, IOM; Jodie A. Perry, IOM

Staff in attendance: Raymond P. Towle, IOM, CAE; Karyn K. MacRae, IOM, CAE, CMP; Shelby Parish, IOM, CMP; Meghan Morgan, IOM; Andrew Y. Weller; Carly Turk

Not in attendance: Marla C. Akridge, IOM; Reggie Henry, CAE; Tony Vedda, IOM, CCE

I. Welcome and Introductions

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

II. Approval of Minutes

The minutes from October 9, 2014 were unanimously approved.

III. Curriculum Overview

A. Benchmarking Documents

- The committee reviewed the contents of the tabs in the curriculum binder.

B. 2015 Updates

- New Faculty

It is our goal to attract and engage in the program new faculty members to keep our curriculum current with fresh perspectives. In 2015, we identified and contracted with 17 new faculty members, which is 27 percent of our total faculty.

- Course Audit Forms

The course audit feedback plays a role in the curriculum review process for this meeting. Bob thanked those who helped by participating in the course audit process. This past summer 41 audits were conducted.

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C. Class Updates

- Course Changes

After being approved for the curriculum during the 2014 meeting, the following courses had changes implemented in 2015: E250 PACs and Political Endorsements; C270 Effective Government Affairs Programs; C470 Advocacy and Alliances; E140 Building Organizational Excellence; E360 Strategic Communications; C125 Hiring, Firing, and Everything In Between; and C150 Communicating with Confidence.

- Absence Response Plan

For the second year in a row, Institute utilized a formal, uniform Absence Response Plan at all five sites. There were 22 individuals needing to complete make-up work in 2015.

D. 2014-2015 Curriculum Committee Assignments

- Syllabus Updating

Throughout the last year, the Curriculum Committee worked to update the syllabus through updating the sub-bullets listed under course objectives. Institute staff selected 21 courses for the committee to revamp. The syllabus has been updated to reflect the suggested additions of the Curriculum Committee members.

E. Curriculum Changes for 2015

- Course Changes

The following changes were approved for the current curriculum and will go into effect in 2015. C440 Collaborative Leadership was eliminated from the curriculum. Its concepts were absorbed into C490 Organization Leadership for the Future and C430 Becoming a Strategic Manager.

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C490 Organization Leadership for the Future

Old Title:

C490 IOM and Beyond

New Title:

C490 Organization Leadership for the Future

Old Course Description

Review your Institute experience and discuss professional development through a roundtable discussion with your peers. Learn what exists beyond Institute, as well as ways to stay involved in the program.

New Course Description:

Maximize your organization's potential by keeping current on trends and the environment around your organization. Create a synergistic environment through trust, appropriate culture, and the ability to affect change when needed.

Old Course Objectives:

- Exploring avenues for professional certification.
- Understanding proper work-life balance.
- Recognizing IOM lessons learned and applied.

New Course Objectives:

- Utilizing environmental scanning.
- Implementing techniques to lead change.
- Developing a culture of leadership.

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C430 Becoming a Strategic Manager

Old Course Description:

Management is one thing; becoming a strategic manager takes you to the next level. Strategic managers think for the future and strive to develop others and prepare teams to function for what's ahead.

New Course Description:

Strategic managers strive to develop others and foster collaborative teams that can lead the organization toward success now and in the future.

Old Course Objectives:

- Understanding leadership trends for strategic managers.
- Training staff and volunteers to enhance their leadership potential.
- Building dynamic teams for success.

New Course Objectives:

- Building positive relationships with your team and external stakeholders and collaborators.
- Setting expectations and coaching your team.
- Measuring results.

C420 Current Legal Issues Facing Your Organization

C420 Current Legal Issues Facing Your Organization is a new addition to the curriculum.

Course Description:

Timely legal issues that can and will suddenly strike; and when to contact your attorney!

Course Objectives:

- Examining issues affecting your organization and the legal pitfalls.
- Understanding employment agreements at both executive and junior levels.
- Exploring anti-trust laws and how they relate to not-for-profit organizations.

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E161 Business Communication Technology Trends (#OrgComm)

Old Title:

E161 Technology Trends and Tools

New Title:

E161 Business Communication Technology Trends (#OrgComm)

Old Course Description:

Keeping up with technology can be challenging in any industry. Discover the latest trends in web-based communications to effectively and efficiently grab the attention and esteem of your members.

New Course Description:

Keeping up with technology and social media can be challenging in any industry. Discover the latest trends to effectively and efficiently grab the attention and esteem of your members.

Old Course Objectives:

- Understanding current trends in technology.
- Preparing your staff for future technology.
- Reaching your audience with the latest technology tools.

New Course Objectives:

- Understanding current trends in technology and social media.
- Linking your organizational strategy to the use of technology and social media.
- Reaching your audience with the latest technology and social media tools.

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E180 Building Better Boards and Committees

Old Course Description:

Orientation sessions set the tone for new boards and create opportunities for them to operate cohesively. Learn the essential elements of a successful orientation and techniques to motivate your board.

New Course Description:

Learn to build strong boards and committees from recruiting the right people to successfully orienting board and committee members and planning for succession.

Old Course Objectives:

- Structuring a board or committee orientation.
- Setting expectations for board or committee members.
- Coaching the board or committee to think strategically.

New Course Objectives:

- Recruiting board members that reflect the diversity of your members.
- Structuring a board or committee orientation program and setting expectations.
- Coaching the board or committee to think strategically and prepare for succession.

C250 Customer Service Inside and Out

Old Course Objectives 1 and 3:

- Defining a customer service vision for your organization or department.
- Managing customer expectations.

New Course Objectives 1 and 3:

- Learning to cultivate a customer service vision within your organization.
- Understanding and managing customer expectations.

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C441 Industry Forecast

Old Course Objective 3:

- Exploring the technology horizon.

New Course Objectives 3

- Preparing to manage workforce trends and demographic shifts.

IV. Chairman's Report

Bob thanked everyone for a great year and their participation. He introduced Megan Lucas, IOM, CECD as the next Chair of the committee. Megan thanked Bob for his service.

V. Additional Business

The committee had no additional business.

VI. Adjourn

The next meeting will take place on September 29, 2016 in Washington, DC.



COURSE RANKING

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CORE COURSES		CUMULATIVE COURSE AVERAGE				
		2012	2013	2014	2015	2016
C250	Customer Service Inside and Out	4.63	4.74	4.68	4.64	4.85
C220	Is That Legal?	4.81	4.85	4.81	4.87	4.82
C150	Communicating With Confidence	4.86	4.73	4.86	4.93	4.81
C180	Guide to Governance	4.80	4.82	4.82	4.84	4.81
C340	Strategic Planning	4.70	4.77	4.77	4.57	4.77
C310	Budgeting and the Bottom Line	4.55	4.47	4.68	4.71	4.71
C430	Becoming a Strategic Manager	4.55	4.41	4.28	4.76	4.68
C360	Innovate or Die	4.58	4.36	4.32	4.45	4.67
C110	Financial Fitness	4.54	4.38	4.41	4.66	4.63
C230	Managers Who Motivate	4.54	4.78	4.58	4.64	4.63
C380	Volunteer Management	4.63	4.48	4.47	4.55	4.61
C130	Unleash the Leader Within	4.53	4.53	4.22	4.50	4.59
C330	Everyday Ethics	4.62	4.63	4.61	4.58	4.59
C270	Effective Government Affairs Programs	4.47	4.31	4.18	4.19	4.58
C460	Integrating Strategic Technology Solutions	4.69	4.50	4.51	4.56	4.58
C440	Collaborative Leadership	4.35	4.80	4.53	4.71	4.55
C125	Hiring, Firing, and Everything In Between	4.83	4.77	4.65	4.77	4.45
C420	Current Legal Issues Facing Your Organization	-	-	-	-	4.44
C185	Recruit, Engage, and Retain Your Members	4.72	4.54	4.50	4.58	4.42
C470	Advocacy and Alliances	4.10	4.17	3.80	4.47	4.36
C490	Organization Leadership for the Future	4.77	4.41	4.44	4.75	4.36
C341	Win-Win Partnerships	4.28	4.64	4.36	4.32	4.25
C260	Marketing Strategies	4.66	4.74	4.39	4.57	4.18
C441	Industry Forecast	4.47	4.68	4.54	4.54	4.16
C261	Events: Strategy and Operations	4.30	4.52	4.43	4.48	4.09

Please Note: In years 2012-2013, the academic year represented the summer sites during that year and Winter Institute from the following year (e.g. The 2012 academic year included 2012 summer sites and 2013 Winter Institute). In 2014, we instituted a new academic year that is reflective of the calendar year.



COURSE RANKING

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ELECTIVE COURSES		CUMULATIVE COURSE AVERAGE				
		2012	2013	2014	2015	2016
E240	Strong Associations for the Future	4.83	4.75	4.54	4.28	4.85
E230	Managing Upward	4.74	4.80	4.67	4.76	4.77
E362	Policy Development and Implementation	4.86	4.88	4.84	4.90	4.77
E380	Delivering Value	4.77	4.69	4.72	4.75	4.77
E210	Executive Finance	4.61	4.74	4.75	4.78	4.76
E120	Executive Law	4.64	4.63	4.68	4.71	4.73
E360	Strategic Communications	4.71	4.77	4.72	4.67	4.71
E163	Communicating Through the Media	4.59	4.57	3.40	4.54	4.70
E250	PACs and Political Endorsements*	-	-	-	4.44	4.66
E211	Sponsorship Solicitation	4.74	4.77	4.71	4.72	4.65
E140	Building Organizational Excellence	4.65	4.79	4.77	4.44	4.64
E126	Dealing with Challenging Employees	4.86	4.81	4.87	4.86	4.63
E142	Fundamentals of Comm. and Econ. Dev.	4.49	4.54	4.53	4.63	4.62
E241	Strong Chambers for the Future	4.62	4.78	4.65	4.71	4.62
E161	Business Comm. Tech. Trends (#OrgComm)	4.76	4.69	4.59	4.70	4.60
E330	Learning to Let Go	4.81	4.77	4.74	4.74	4.60
E244	Using Data to Grow and Sustain Your Organization	4.59	4.54	4.49	4.68	4.59
E310	Dues and Don'ts	4.83	4.74	4.71	4.83	4.59
E110	Revving Your Revenue Stream	4.58	4.49	4.37	4.55	4.57
E180	Building Better Boards and Committees	4.50	4.40	4.37	4.39	4.51
E350	The Art of Persuasion and Negotiation	4.73	4.69	4.76	4.63	4.51
E331	CEO Lessons Learned	4.61	4.42	3.76	4.43	4.47
E243	Developing a Competitive Workforce	4.27	4.24	4.39	4.60	4.43
E342	Advanced Strategies of Comm. and Econ. Dev.	-	4.71	4.35	4.48	4.40

Please Note: In years 2012-2013, the academic year represented the summer sites during that year and Winter Institute from the following year (e.g. The 2012 academic year included 2012 summer sites and 2013 Winter Institute). In 2014, we instituted a new academic year that is reflective of the calendar year.

*PACs and Political Endorsements was new in 2015. Previously, E250 was Creating a Government Affairs Program.



COURSE POPULARITY

ELECTIVE COURSES		ENROLLMENT				
CUMULATIVE BREAKDOWN BY YEAR		2012	2013	2014	2015	2016
E241	Strong Chambers for the Future	157	157	180	174	179
E380	Delivering Value	141	152	162	156	173
E140	Building Organizational Excellence	120	127	131	145	159
E360	Strategic Communications	112	115	126	151	146
E211	Sponsorship Solicitation	121	125	134	129	143
E180	Building Better Boards and Committees	114	105	115	112	137
E161	Technology Trends and Tools	82	120	127	149	130
E240	Strong Associations for the Future	47	36	58	57	123
E244	Using Data to Grow and Sustain Your Org.	114	114	145	115	122
E210	Executive Finance	87	83	89	89	116
E126	Dealing with Challenging Employees	77	80	80	43	111
E142	Fundamentals of Comm. and Ec. Development	92	131	113	126	107
E331	CEO Lessons Learned	125	94	96	137	106
E350	The Art of Persuasion and Negotiation	112	127	135	150	102
E310	Dues and Don'ts	80	84	73	51	101
E230	Managing Upward	70	82	83	128	98
E342	Advanced Strategies of Comm. and Ec. Development	-	64	68	80	98
E330	Learning to Let Go	78	79	92	100	95
E362	Policy Development and Implementation	72	72	74	59	94
E243	Developing a Competitive Workforce	18	58	55	73	92
E163	Communicating Through the Media	114	85	89	131	91
E120	Executive Law	82	91	82	84	90
E110	Revving Your Revenue Stream	114	129	130	138	87
E250	PACs and Political Endorsements*	-	-	-	72	39

Please Note: In years 2012-2013, the academic year represented the summer sites during that year and Winter Institute from the following year (e.g. The 2012 academic year included 2012 summer sites and 2013 Winter Institute). In 2014, we instituted a new academic year that is reflective of the calendar year.

Also Note: The number of times an elective was offered in 2016 varies between three and six times per elective.

*PACs and Political Endorsements was new in 2015. Previously, E250 was Creating a Government Affairs Program.



COURSE POPULARITY

ELECTIVE COURSES		ENROLLMENT				
2016 BREAKDOWN BY SITE		Winter	MW	SE	West	NE
E110	Revvng Your Revenue Stream	34	-	34	19	-
E120	Executive Law	27	-	25	19	19
E126	Dealing with Challenging Employees	29	27	20	14	21
E140	Building Organizational Excellence	33	35	35	30	26
E142	Fundamentals of Comm. and Ec. Development	29	13	35	-	30
E161	Technology Trends and Tools	35	20	32	17	26
E163	Communicating Through the Media	27	18	32	-	14
E180	Building Better Boards and Committees	32	27	31	18	29
E210	Executive Finance	27	22	26	21	20
E211	Sponsorship Solicitation	35	33	31	23	21
E230	Managing Upward	34	-	31	15	18
E240	Strong Associations for the Future	32	20	16	23	32
E241	Strong Chambers for the Future	36	21	67	27	28
E243	Developing a Competitive Workforce	34	21	29	8	-
E244	Using Data to Grow and Sustain Your Org.	34	23	32	-	33
E250	PACs and Political Endorsements	14	-	12	-	13
E310	Dues and Don'ts	26	22	31	-	22
E330	Learning to Let Go	30	20	18	13	14
E331	CEO Lessons Learned	35	-	34	16	21
E342	Advanced Strategies of Comm. and Ec. Development	30	16	33	19	-
E350	The Art of Persuasion and Negotiation	37	-	34	-	31
E360	Strategic Communications	32	23	31	30	30
E362	Policy Development and Implementation	20	25	22	14	13
E380	Delivering Value	36	34	44	25	34

FACULTY COMPOSITION ANALYSIS



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Please note: Course evaluations are based on a five-point scale, and beginning in 2014, the academic year became reflective of the calendar year.

2016 FACULTY

Contracted with a total of 65 faculty members, of those 15 were new faculty members (23%).

- Course Evaluation Average: 4.50 (65)
 - Expert 4.67 (3)
 - Consultant 4.57 (26)
 - Practitioner 4.46 (34)
 - Professor 4.09 (2)

2015 FACULTY

Contracted with a total of 64 faculty members, of those 17 were new faculty members (27%).

- Course Evaluation Average: 4.65 (64)
 - Expert 4.78 (4)
 - Consultant 4.66 (30)
 - Practitioner 4.65 (28)
 - Professor 4.34 (2)

2014 FACULTY

Contracted with a total of 60 faculty members, of those 15 were new faculty members (25%).

- Course Evaluation Average: 4.57 (60)
 - Expert 4.80 (3)
 - Consultant 4.59 (32)
 - Practitioner 4.57 (24)
 - Professor 3.44 (1)

2013 ACADEMIC YEAR FACULTY (2014 WINTER AND 2013 SUMMER SITES)

Contracted with a total of 58 faculty members, of those 17 were new faculty members (29%).

- Course Evaluation Summer Average: 4.55 (58)
 - Expert 4.65 (3)
 - Consultant 4.61 (24)
 - Practitioner 4.47 (28)
 - Professor 4.46 (3)

INSTITUTE FOR ORGANIZATION MANAGEMENT

2016 Syllabus for Core and Elective Courses

Please note: This document is a work in progress designed for the purpose of elaborating on course content. Final adjustments will continue as Institute faculty and volunteers provide input.

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Overview of Curriculum

From membership recruitment and retention to legal issues and finance, Institute offers education on running a nonprofit organization. In addition, its curriculum is aligned with the knowledge requirements for the CAE and CCE nonprofit industry certifications, enabling participants to achieve all their professional goals. In total, participants who complete the four-week program earn 96 credit hours toward their CAE certification or 28 points toward their CCE certification.

The courses at Institute are taught by instructors from various backgrounds, including executives of associations, chambers of commerce, and nonprofits; industry consultants; lawyers and CPAs; and college professors. Their in-depth instruction combines practical and academic experience and is designed to help participants explore cutting-edge ideas and best practices to strengthen their organizations.

Both core and elective courses comprise Institute's curriculum.

Core Courses

During each week of Institute, participants engage in six, three-hour core courses. These courses ensure that all facets of nonprofit management have been covered upon completion of the program.

Elective Courses

Institute's two-hour elective courses enable participants to delve deeper into specific areas of interest and choose courses tailored to their individual needs. Participants take one elective from each of three groups.

Course curriculum is reviewed and updated annually by the Curriculum Committee using data from course evaluations and feedback from participants and volunteers. Faculty are surveyed after every class for suggestions and content improvements.

Syllabus Format

- Course Description
- 3 Course Objectives
 - Recommended percentage of time allotment
- Suggested class exercises
- Additional learning opportunities

C110 Financial Fitness

Course Description:

One of the leading reasons for subpar financial performance and job loss in the nonprofit industry is poor financial managerial skills. Don't let this area be the cause of your demise.

Course Objectives:

- Establishing better comprehensive financial reporting procedures and analysis.
 - 50%
 - What makes a non-profit organization different from a for-profit company i.e. 501(C)(3) vs. 501(C)(6)
 - Creating clear reports for the board, staff, and members
 - Analyzing income statements and balance sheet statements
 - Touch briefly on budgeting (segue into C310 Budgeting and the Bottom Line course)
- Implementing strong internal financial controls and internal control building blocks.
 - 30%
 - Provide examples and stories around typical problem and high risk control areas
 - Discussion points: What can go wrong? Biggest mistakes.
 - Reality check: Is your organization in danger? Always assume the answer is yes!
- Understanding advanced compliance issues related to the Form 990 and governance.
 - 20%
 - Code of ethics and conflict of interest policy
 - Documentation retention policy
 - Whistleblower policy
 - Board review of Form 990 policy
 - Compensation review and approval policy and process
 - Policy related to minutes for all board and committee meetings
 - Fin. 48 disclosure of compliance with other tax filings and positions
 - Disclosure of fraud if occurred
 - Disclosure of affiliations and joint ventures

Suggested class exercises:

- Practice analyzing statements
- Form 990 case study

Additional learning opportunities:

- C310 Budgeting and the Bottom Line
- E210 Executive Finance

C125 Hiring, Firing, and Everything In Between

Course Description:

Recruiting, retaining, and supporting employees can be among the most difficult and time-consuming duties of any supervisor. Learn techniques for managing employees—from recruitment to separation—and key benefit trends for retention.

Course Objectives:

- Hiring, orienting, and training top-notch employees.
 - 40%
 - Writing good, clear position descriptions
 - Recruiting – good, bad, and illegal interview questions
 - Training staff and encouraging professional development
 - Orientation procedures

- Evaluating work performance.
 - 40%
 - Auditing jobs and skills (communication, organization, leadership, interpersonal relations, judgment and decision making, and analytical ability)
 - Establishing criteria for performance appraisals
 - Promoting quality of work performance
 - Handling termination

- Ensuring compliance and effective steps for separation.
 - 20%
 - Legal documentation
 - Overview of HR laws and regulations

Suggested class exercises:

- Position description write-up
- Brainstorming good interview questions
- Case study

Additional learning opportunities:

- C220 Is That Legal?
- E230 Managing Upward
- E126 Dealing With Challenging Employees

C130 Unleash the Leader Within

Course Description:

As we manage people, tasks, and our careers, focusing on our personal leadership style sometimes falls to the wayside. Leadership is an integral part of becoming a successful professional. Acquire the skills you need to become the leader you want to be.

Course Objectives:

- Utilizing tools needed to be a leader.
 - 33%
 - Describe the leadership environment
 - Key leadership skills and characteristics
 - Understanding the difference between leadership and management
 - Leadership myths and misconceptions
 - Ex: Leaders are born, not made; title or position equals leadership
- Understanding deterrents to successful leadership.
 - 33%
 - Understanding your weaknesses
 - Ethical challenges
- Identifying styles of effective leaders.
 - 34%
 - Qualities of successful leaders and different types of leaders (i.e., CEO, manager)
 - Explore how leadership style, follower readiness, and emotional intelligence interact
 - Understanding your leadership style

Suggested class exercises:

- Leadership style test
- Comparing and contrasting managers and leaders
- Share personal best-leadership experiences
- Case study

C150 Communicating With Confidence

Course Description:

Delivering an important message can be a difficult skill to master. Learn to communicate your message whether in the mailroom or boardroom.

Course Objectives:

- Honing your verbal and non-verbal communication skills.
 - 40%
 - Tailoring the speech/presentation to meet the needs of your audience
 - Anticipating and handling questions from the audience
 - Overcoming fears and weaknesses

- Delivering your ideas as messages that resonate.
 - 40%
 - Storytelling
 - Crafting an effective message
 - Understanding your audience
 - Being sensitive to diversity (e.g. race, ethnicity, gender, religion, age, sexual orientation, nationality, disability, appearance, geographic location, and professional level)
 - Strategies for diagnosing listening preferences

- Building an effective presentation.
 - 20%
 - Effective use of PowerPoint

Suggested class exercises:

- Self-analysis test on listening styles
- Deliver mini-impromptu speeches and mock media interviews

Additional learning opportunities:

- C260 Marketing Strategies
- E163 Communicating Through the Media
- E350 The Art of Persuasion and Negotiation
- E360 Strategic Communications

C180 Guide to Governance

Course Description:

A sound governance structure is needed to ensure success at all levels of an organization. Create a great organization through strong relationships with volunteers.

Course Objectives:

- Building a solid governance structure.
 - 40%
 - Is governance structure in line with the mission?
 - Determine board, committee, and task force structure

- Enhancing volunteer support for governance.
 - 30%
 - Tie into organization mission
 - Helping to create and change governance structure
 - Key tips and best procedures
 - Establishing priorities with volunteer leadership
 - How do you get them on board; developing leadership

- Reviewing key governance documents.
 - 30%
 - Schedule for review
 - Articles, bylaws, policies
 - Do they reflect current regulatory requirements?
 - Form 990

Suggested class exercises:

- Ask students to bring a copy of their organization's bylaws and articles to class to review
- Review model governance documents as examples
- Case study

Additional learning opportunities:

- C380 Volunteer Management

C185 Recruit, Engage, and Retain Your Members

Course Description:

Organizations that retain their members listen to them and exceed their expectations. Identify the myths and realities about keeping members and become familiar with approaches that you can use to deliver products and services to meet members' ever-changing needs.

Course Objectives:

- Understanding typical member retention rates and patterns.
 - 30%
 - Recruiting new members
 - Invest in systems, databases and supporting technology to improve efficiency in managing membership (lead-in for technology elective, touch on as intro only)
 - Ex.: track frequency of participation
 - Ex.: focus on top 100 customers who know you and like participating in your programs
 - Cost of member turnover
 - Why members don't return
 - Why members don't complain
 - Target marketing campaign (tie-in to C260 Marketing Strategies)

- Identifying ways to gauge member needs and satisfaction.
 - 40%
 - Conduct needs-analysis and environmental scan to determine current members' needs in the context of the chamber's or association's mission and objective
 - Plan and implement recruitment and retention programs based on the strategic plan and results of the needs-analysis
 - Increase member participation
 - Measure member satisfaction

- Implementing techniques to identify and deliver the products and services your members want.
 - 30%
 - Identify and implement strategies to continually gather member feedback and to increase member return on investment
 - Customer rewards
 - Best customer program and incentives
 - Customer service basics (lead-in for C250 Customer Service Inside and Out)

Suggested class exercises:

- Success stories from other organizations
- Cost of turnover worksheet exercise
- Survey students on membership status prior to start of class to better tailor presentation
- Case study

Additional learning opportunities:

- C250 Customer Service Inside and Out

C220 Is That Legal?

Course Description:

Perhaps the most important part of any job is knowing the law. Don't put your career on the line because you are simply misinformed on legal issues.

Course Objectives:

- Recognizing corporate and operational legal issues.
 - 30%
 - Organization and management documents, publications, reports, and other documents in compliance with legal requirements
 - Importance of incorporation versus unincorporation, bylaws, and minutes
 - Employment law
 - How to select legal counsel

- Identifying areas in which legal problems are most likely to occur.
 - 30%
 - Insurance coverage
 - Issues in employment law
 - Terminating employees
 - Employment-at-will doctrine
 - Illegal questions to ask when hiring (covered somewhat in C125 Hiring, Firing, and Everything in Between)
 - Sexual harassment
 - Discrimination: the different types and specific laws against
 - Disabilities: what does and doesn't qualify
 - Immigration
 - Publications
 - Copyrights
 - Defamation/Libel
 - Invasion of privacy
 - Endorsements
 - Work for hire

- Understanding legal trends that affect nonprofits.
 - 40%
 - Taxation
 - Tax exempt status
 - Unrelated business income
 - Advertising income
 - Sarbanes-Oxley
 - Not-for-profit law
 - Form 990
 - Antitrust law
 - Tort liability
 - Apparent authority
 - Conflict of interest
 - Board issues

Suggested class exercises:

- Case study

Additional learning opportunities:

- E120 Executive Law
- C420 Current Legal Issues Facing Your Organization

C230 Managers Who Motivate

Course Description:

You play an integral part in empowering your colleagues to achieve greatness. Learn how to assess and improve your own management style tailored to the needs of your diverse workforce.

Course Objectives:

- Developing your personal management style.
 - 40%
 - Developing a personal action plan for improvement

- Understanding a diverse workforce to effectively reward and recognize employees.
 - 40%
 - Define “diverse”
 - Ethnic, generational, sexual, racial, religious
 - Create a climate of acceptance, understanding, and respect for diversity
 - Use accountability measures to manage for desired results
 - Recognize different behavior styles and adapt to meet their preferences
 - Explore elements of building strong relationships with others

- Managing conflict and change.
 - 20%
 - Common pitfalls and how to avoid them
 - Techniques for success
 - The other side of the coin—managing agreement, status quo

Suggested class exercises:

- Case study

Additional learning opportunities:

- E230 Managing Upward
- E330 Learning to Let Go
- C430 Becoming a Strategic Manager

C250 Customer Service Inside and Out

Course Description:

It is essential to possess a customer service mentality. Discover ways to outline and refine a quality vision statement for your customers to keep them satisfied.

Course Objectives:

- Learning to cultivate a customer service vision within your organization.
 - 33%
 - Identify ways to make your organization or department's processes, policies, and procedures conducive to providing exceptional customer service
 - Understand who the customer is, both internally and externally
 - Include a "quality" element
 - Implementing a customer service program
- Earning a reputation for superior customer service.
 - 33%
 - Benefits of creating loyal members
 - Steps for creating loyal members
 - Setting up a quality assurance program
- Understanding and managing customer expectations.
 - 34%
 - Setting reasonable expectations
 - Identifying how to use positive communication when offering member service
 - How to serve upset members by learning how to calm them
 - How to address abusive members (cover if applicable to attendees)

Suggested class exercises:

- Self-evaluation test
- Case study

Additional learning opportunities:

- C185 Recruit, Engage, and Retain Your Members
- E380 Delivering Value

C260 Marketing Strategies

Course Description:

Learn how to create and implement a marketing plan to promote your organization and community. Find out how to target specific audiences, develop effective one-to-one and one-to-many communications, and assess marketing programs.

Course Objectives:

- Identifying key elements of a marketing plan.
 - 40%
 - Learn how to develop strategies to market what your organization offers (services, programs, events, and products)
 - Review the basics of market segmenting, prospect targeting, messaging/positioning techniques, and pricing

- Implementing techniques for researching your audience and measuring success.
 - 40%
 - Enhance methods to distribute your “product” by building awareness and visibility of the organization through marketing and communications
 - Embrace member and market research as a key organizational driver
 - Assessing your outcomes/value and promoting return on investment to members

- Utilizing marketing tools for nonprofits.
 - 20%
 - Use technology in marketing communications (brief lead-in to C460 Integrating Strategic Technology Solutions) including social and traditional media
 - Gain an appreciation that successful marketing includes the whole organization (all staff and board) and supports the organization’s business plan as well as long-term plan

Suggested class exercises:

- Case study of marketing strategies

Additional learning opportunities:

- C460 Integrating Strategic Technology Solutions
- E360 Strategic Communications
- E140 Building Organizational Excellence

C261 Events: Strategy and Operations

Course Description:

Events and programs typically bring together a wide range of stakeholders for a specific purpose. Examine events that exceed the needs and expectations of all involved.

Course Objectives:

- Creating events with a strategic purpose and tactical event planning.
 - 40%
 - Reevaluating your sacred cows
 - Does your program align with your overall mission?
 - What's a successful program or event?

- Utilizing technology to effectively reduce costs, reach a larger audience, and streamline processes.
 - 20%
 - Pricing development based on total costs including staff and overhead
 - Technologies used throughout the event planning and implementation processes

- Examining logistical operations, budgeting, and staff time.
 - 40%
 - Discuss staging an environment that yields success
 - Key components: venues, evaluations, registration, and atmosphere

Suggested class exercises:

- Breakouts

Additional learning opportunities:

- C360 Innovate or Die
- E140 Building Organizational Excellence
- E380 Delivering Value

C270 Effective Government Affairs Programs

Course Description:

Nonprofits serve as advocates for their members and communities. Despite your experience or your organization's size, establishing a grassroots network doesn't have to be overwhelming. Learn the basics of a successful approach to legislative advocacy and policy.

Course Objectives:

- Determining who should be involved in the program and why.
 - 20%
 - Members
 - Government Relations committee board.
 - Key benefits

- Creating a legislative policy.
 - 40%
 - Potential issues to be addressed
 - When and how to communicate the policy to elected officials
 - Approaches to advancing your legislative agenda

- Running a grassroots network.
 - 40%
 - The process of identifying and tracking pertinent legislation
 - How your organization can educate members on political issues

Suggested class exercises:

- Drafting a policy
- Case study

Additional learning opportunities:

- C470 Advocacy and Alliances
- E250 PACs and Political Endorsements

C310 Budgeting and the Bottom Line

Course Description:

Every organization tries to stretch available dollars as far as possible through wise spending, responsible income forecasts, and sound expense projections. Examine the concepts you need to put together meaningful budget-based financial reports to help you better manage your organization during difficult times.

Course Objectives:

- Developing program-based budgeting for tracking the real financial results and staying ahead of the curve.
 - 40%
 - How to get the nonfinancial manager involved
 - Monitoring financial performance
 - Learn how to incorporate projections into the process

- Building a better budget.
 - 40%
 - Stepping into the process
 - Building ownership and involvement
 - Budget tools and templates

- Exploring other critical budget considerations.
 - 20%
 - Reserves and reserve policies
 - Capital budgets
 - In-kind contributions and gifts
 - Budgeting for salaries, strategies, and tools
 - Contingency budgets
 - Cash flow considerations

Suggested class exercises:

- Budgeting exercises
- Case study

Additional learning opportunities:

- C110 Financial Fitness
- E110 Revving Your Revenue Stream
- E210 Executive Finance
- E211 Sponsorship Solicitation

C330 Everyday Ethics

Course Description:

Become aware of the pitfalls, red flags, and troublesome routine activities to avoid. Learn how to protect your character and your organization.

Course Objectives:

- Examining how individuals and organizations think, act, and develop policies.
 - 30%
 - Define ethics and integrity
 - Essential tools to develop values and ethics documents and statements

- Learning how to perform an ethical analysis of an organization.
 - 30%
 - Developing a code of conduct
 - Performing code of conduct tests
 - Measuring standards

- Determining if structure or policy changes are necessary to avoid ethical conflicts.
 - 40%
 - Managing unethical behavior
 - Leading with integrity
 - Ethical areas for organizations
 - Membership: dues and qualifications; referrals and bids
 - Leadership qualifications
 - By-Laws: application and consistency
 - Communication
 - Policy positions
 - Personnel
 - Committees
 - Facilities
 - Elections
 - Benefits

Suggested class exercises:

- Self-analysis or company-analysis
- Case study

Additional learning opportunities:

- C130 Unleash the Leader Within
- E140 Building Organizational Excellence

C340 Strategic Planning

Course Description:

Successful organizations plan strategically for the future. By following a few basic principles, your organization can develop a strategic plan to give direction for governance and management.

Course Objectives:

- Understanding processes for strategic planning.
 - 30%
 - Develop a focused mission and vision statement
 - Critical elements and characteristics of a mission statement
 - Brainstorming challenges
 - Communicate to members, staff, public
 - Declaration of principles
 - Goals, strategies, and tactics
- Implementing strategic planning tools and techniques.
 - 40%
 - Establish and implement a strategic planning process
 - Discuss trends and methodologies in strategic planning (rolling, strategic plan, balanced score card, etc.)
 - Developing or facilitating mission-focused strategic plans with staff, board members, and stake holders
- Translating the strategic plan into action.
 - 30%
 - Develop a business plan with tactics that advance the strategic goals
 - Systematic structure to monitor and adjust strategies
 - Keeping stakeholders informed of the plan

Suggested class exercises:

- Best practices; bring sample plans to class
- Examples of mock plan
- Case study

Additional learning opportunities:

- E140 Building Organizational Excellence

C341 Win-Win Partnerships

Course Description:

Long- and short-term partnerships with other organizations can help your organization reach community goals that may be unattainable if attempted alone. Form cooperative arrangements with others to pool resources and to achieve great things.

Course Objectives:

- Understanding the benefits of coalitions and strategic alliances.
 - 40%
 - What are strategic alliances and coalitions?
 - Key terms
 - Why are coalitions developed?
 - Common reasons why coalitions are formed
 - Major benefits
 - Potential risks

- Identifying different types of coalitions and alliances.
 - 20%
 - Areas well-suited for partnering
 - Ex.: legislative, education, special events, publications, research projects, public relations, endorsements, and sponsorships
 - Types of alliances and partnerships
 - Ex.: networking, research, political/public policy, business, technology, and public/private partnerships
 - Building alliances and coalitions within your own organization
 - Ex.: top investors, CEO's/HR directors, minority businesses, technology companies, and realtors/homebuilders

- Implementing steps for effective collaboration.
 - 40%
 - Practical steps for forming and sustaining a coalition
 - Characteristics of effective and successful partnerships
 - Leveraging stakeholder networks for growth
 - Handling problems that may arise
 - When things go wrong
 - Barriers to forming alliances
 - Strategies to minimize barriers
 - Developing international relationships (partnerships, alliances)

Suggested class exercises:

- Brainstorm potential partnerships and alliances
- Key questions to ask before moving forward with alliances
- Sharing personal experiences
- Case study

Additional learning opportunities:

- C470 Advocacy and Alliances

C360 Innovate or Die

Course Description:

Organizations compete to show their value and relevance among current and potential members. Learn how to build a creative and innovative culture in your organization. Utilize tools to select the best ideas, evaluate the details, and see the best ideas through.

Course Objectives:

- Building a creative and innovative culture to generate ideas.
 - 50% (includes time for the activity at the end of class)
 - A creative and innovative culture:
 - Balanced blend of methodologies, work practices, culture, and infrastructure
 - Embraces risks and wild ideas and tolerates the occasional failure
 - Cultivates a culture of innovation and people first
 - Allows time for brainstorming, creativity, and innovation
 - Develops and honors talent, not seniority
 - Strives for, measures, and exceeds quality expectations
 - Ways to create a creative and innovative culture:
 - Infuse creativity and innovation as core values
 - Offer rewards and recognition for new ideas
 - Collect feedback from members and discuss insights with staff
 - Conduct brainstorming sessions to improve on services and generate new ideas for ways to serve members
 - Respect the 'devil's advocates' on staff and listen to different perspectives
 - Invest in developing staff to be more creative and innovative
 - Celebrate innovation with members and in the community
- Using research to determine your members' needs and discern the real costs and returns.
 - 25%
 - Form a plan to review your programs, products, or services periodically
 - Research pertinent information, such as increase sales, reduce costs, and improve operations
 - What can we learn from others?
 - Where can I conduct research and gather data?
 - What is the market potential? Outside factors to consider (competition)?
 - Monitor revenue supply
 - Project-based budgeting (including staff time)
 - Working a step-by-step new product development process
 - Tax issues (royalty vs. unrelated business income)
 - Labor intensiveness vs. financial gain
 - Revenues exceed costs? (cost-benefit)
- Revitalizing a product, program, service, or even your own organization.
 - 25%
 - Laying out the proposal and planning the product roll-out
 - Ex.: resources, logistics, audiences, design and content, pilot testing, integration with other programs and services, legality
 - Setting metrics – conduct a new products audit (benchmarking)

C380 Volunteer Management

Course Description:

It is challenging to attract and retain quality volunteer leaders. Examine leadership and succession programs in nonprofit organizations through strategic volunteer management.

Course Objectives:

- Developing volunteer leadership.
 - 30%
 - Ensure that volunteer leadership represent the diversity of the membership
 - Ex.: type of businesses, age, gender, ethnicity, geography
 - Create opportunities for members to participate in activities and advancement
 - Ex.: focused, short-term volunteer opportunities; committee participation, leadership roles
 - Educate and orient board members, volunteers, and staff regarding their roles and responsibilities
- Implementing successful strategies to recruit organizational leadership.
 - 50%
 - Develop a list of available positions
 - Maintain an appropriate volunteer recruitment, training, recognition, and accountability system
 - Discuss procedures to recognize, reward, and hold volunteers accountable
- Building a volunteer structure for future leaders to emerge.
 - 20%
 - Establish a succession plan for volunteer leadership
 - Develop volunteer-staff partnership models
 - Sound training
 - Motivate

Suggested class exercises:

- Case study

Additional learning opportunities:

- C180 Guide to Governance
- E180 Building Better Boards and Committees

C420 Current Legal Issues Facing Your Organization

** Offered at 2016 Midwest, Southeast, West, and Northeast Institute sites.*

Course Description:

Timely legal issues that can and will suddenly strike; and when to contact your attorney!

Course Objectives:

- Examining issues affecting your organization and the legal pitfalls.
 - 34%
 - Social media
 - Data breaches
 - Identity theft
 - Intellectual property
 - Contracts

- Understanding employment agreements at both executive and junior levels.
 - 33%
 - Aspects of an effective employee agreement
 - Proper termination procedure
 - Potential liability of negligent referral when responding to inquiries regarding ex-employees

- Exploring anti-trust laws and how they relate to not-for-profit organizations.
 - 33%
 - Issues related to membership criteria and exclusion of potential members
 - Potential liability for boycotts and other anti-competitive concerted activity

Additional learning opportunities:

- C220 Is That Legal
- E120 Executive Law

C430 Becoming a Strategic Manager

Course Description:

Strategic managers strive to develop others and foster collaborative teams that can lead the organization toward success now and in the future.

Course Objectives:

- Building positive relationships with your team and external stakeholders and collaborators.
 - 34%
 - Establishing trust
 - The importance of team building
 - Building successful teams including staff and volunteers to execute the strategic plan
 - Understanding the importance of work/life integration
- Setting expectations and coaching your team.
 - 33%
 - Establishing core values for your team
 - Recognizing different personality types and types of workers
 - Coaching techniques to help your team reach its potential
 - Mentoring as a leadership development tool
- Measuring Results.
 - 33%
 - Developing meaningful measurement for accountability
 - Evaluating success
 - Providing feedback
 - Reporting results
 - Analyzing and understanding data to support the plan the organization needs

Suggested class exercises:

- A team effectiveness assessment
- Case study
- Strengths Finder assessment

Additional learning opportunities:

- C125 Hiring, Firing, and Everything in Between
- C230 Managers Who Motivate
- C380 Volunteer Management
- E140 Building Organizational Excellence

Suggested resource:

- Operation Ratio Report, 14th edition (ASAE)

C440 Collaborative Leadership

**Offered only at 2016 Winter Institute*

Course Description:

Maximize your organization's potential and create a synergistic environment through trust, appropriate culture, and the ability to affect change.

Course Objectives:

- Building trust and relationships for success.
 - 33%
 - Understanding the impact and types of trust in the workplace
 - Tools to use to build trust
 - Developing relationships and strategic networks across organizational boundaries for successful collaborations
 - Promoting a climate of trust in the community/profession
- Developing a culture of leadership.
 - 33%
 - Understanding the pros and cons of different organizational cultures
 - Promoting a culture that is sensitive and responsive to the needs, interests, and values of the membership
 - Tools to sustain a leadership culture
- Implementing techniques to lead change.
 - 34%
 - Understanding your change style
 - Key success factors for affecting change
 - Taking the vision and mission of the organization forward
 - Being a champion of change for others and dealing with resistance to change

Suggested class exercises:

- A culture survey
- A change style assessment
- A case study of collaboration across communities – logistical or professional

Additional learning opportunities:

- C130 Unleash the Leader Within
- C330 Everyday Ethics
- C340 Strategic Planning
- C341 Win-Win Partnerships
- E230 Managing Upward
- E240/241 Strong Associations/Chambers for the Future

C441 Industry Forecast

Course Description:

Is your organization ready for the future? Explore trends and issues affecting the nonprofit world and prepare for the future.

Course Objectives:

- Discovering essential industry trends.
 - 33%
 - Identify what essential industry trends include given the organization's mission (e.g., chambers might look at a broad cross section of economic and community trends, whereas an association might look at industry-specific trends). Trends may include:
 - Nature of belonging and gathering
 - Communications and technology
 - Scarcity and abundance
 - Global impacts
 - Population shifts
 - Political and social fragmentation
 - Resource alignment
 - Catalytic leadership
 - Identify sources for collecting data and recognizing trends
 - Discuss how to distinguish trends from short-term events
- Understanding how the changing complexities of the global market affect your members.
 - 33%
 - Discuss how trends are used in conducting an environmental scan for strategic planning
 - Review global trend data that organizations should observe to be informed
 - Discuss the importance of global markets on local economies
 - Demonstrate how to apply trend analysis and market research to strategic planning
- Preparing to manage workforce trends and demographic shifts.
 - 34%
 - Industry demographic changes
 - Population shifts

Suggested class exercises:

- Case study

C460 Integrating Strategic Technology Solutions

Course Description:

Integrating a dynamic website, contact database, and accounting program is essential in doing business today. Take the necessary steps to further develop a technology plan that works for your organization.

Course Objectives:

- Creating a technology plan and budget.
 - 50%
 - Understanding the technology tool set, integration (i.e., CMS, CRM, ERP and SM, etc.) and how it is needed to support association goals and activities
 - Staff issues with technology and cultural change
 - Weighing the costs, benefits, and return on investment of technology solutions
- Developing technology strategies for your organization.
 - 25%
 - Best practices
- Protecting and maintaining your technology solutions.
 - 25%
 - Identify areas in which new technology tools can improve design, development, and delivery of products and services
 - What's new

Suggested class exercises:

- Case study

C470 Advocacy and Alliances

Course Description:

Once your advocacy program is in place, you are ready to take the next steps. Delve into the ins and outs of the different channels of coalition building and grassroots management.

Course Objectives:

- Developing political coalitions and alliances.
 - 50%
 - Building coalitions
 - Finding issues in common

- Preparing issue papers and other materials.
 - 30%
 - Needs assessment
 - White paper spokesperson

- Implementing and utilizing grassroots networks.
 - 20%
 - How to get started
 - Proven strategies

Suggested class exercises:

- Case study

Additional learning opportunities:

- C270 Effective Government Affairs Programs
- E250 PACs and Political Endorsements
- C341 Win-Win Partnerships

C490 Organization Leadership for the Future

Course Description:

Maximize your organization's potential by keeping current on trends and the environment around your organization. Create a synergistic environment through trust, appropriate culture, and the ability to affect change when needed.

Course Objectives:

- Utilizing environmental scanning.
 - 20%
 - Scanning the environment for change/trends (Resource: Sladek's book "Economy, Demographics, and Technology")
 - The decision to join (Resource: ASAE book "Information, Recognition, Networking" and "10 Lessons for Cultivating Member Commitment: Critical Strategies for Fostering Value, Involvement, and Belonging")
 - Resource: "Horizon Initiative: Chambers 2025"
 - Resource: "Environmental Scanning for Associations: The Everyday Guide to Capturing, Analyzing, and Interpreting Strategic Information"

- Implementing techniques to lead change.
 - 40%
 - Understanding your change style and key success factors for affecting change
 - Taking the vision and mission of the organization forward
 - Being a champion of change for others and dealing with resistance to change (staff and volunteer)
 - Managing upward (to the executive or to the board)

- Developing a culture of leadership.
 - 40%
 - Understanding the pros and cons of different organizational cultures
 - Promoting a culture that is sensitive and responsive to the needs, interests, and value of membership
 - Tools to sustain a leadership culture (staff and volunteer)

Please Note: The final 30 minutes of the class will be led by the Trustees Chair. During this time, the Chair will share opportunities for the graduates to stay engaged with Institute and further their professional development. The Chair will provide the graduates with take home CCE and CAE sample exams.

Suggested class exercises:

- A case study of collaboration across communities
- A case study of how an organization changed its focus (i.e. advocacy, economic development)

Additional learning opportunities:

- ACCE and ASAE Annual Conferences
- Take the CCE and CAE sample tests at home

E110 Revving Your Revenue Stream

Course Description:

Identify new ways to fundraise, sponsor, and build partnerships to bring revenue into your organization. Learn the steps involved to establish partnerships, including due diligence and safeguards to protect your organization and its members.

Course Objectives:

- Discovering avenues to bring revenue into your organization.
 - 40%
 - Grant writing
- Examining potential new sources of non-dues revenue through creative funding.
 - 40%
- Understanding the financial and legal implications associated with different revenue streams.
 - 20%

Suggested class exercises:

- Quick 10 minute brainstorming/idea exchange session

Additional learning opportunities:

- C110 Financial Fitness
- C341 Win-Win Partnerships
- E211 Sponsorship Solicitation

E120 Executive Law

Course Description:

There are many situations in which your organization might be found legally responsible. Examine common areas of risk for nonprofit membership organizations and discuss strategies to manage liability risk.

Course Objectives:

- Recognizing issues that land a nonprofit professional in legal trouble.
 - 30%
 - Common hazard situations and how to avoid them

- Implementing safeguards to protect your organization.
 - 40%
 - Duty of care, duty of loyalty, and duty of obedience

- Managing roles and responsibilities of the board, committees, and task forces.
 - 30%

Additional learning opportunities:

- C220 Is That Legal?
- C420 Current Legal Issues Facing Your Organization

E126 Dealing with Challenging Employees

Course Description:

Handling difficult employee situations can be one of the most tedious and anxiety-producing aspects of management. By handling such situations effectively, it is often possible to turn a difficult situation into a great one.

Course Objectives:

- Defining unsatisfactory employee performance behaviors.
 - 40%
 - Documentation techniques to track the unsatisfactory behavior
 - Tips for evaluating work performance
- Learning tools and techniques to address problematic staff behavior.
 - 30%
 - Tips for conducting regular and effective staff reviews
 - Preventative measures (e.g. New hire orientation, conveying expectations to your team, etc.)
- Identifying actionable steps if you can't turn it around.
 - 30%
 - Steps to help other team members affected cope with the stress
 - Steps to prepare for termination if necessary

Suggested class exercises:

- Position description write-up
- Brainstorming good interview questions
- Case study

Additional learning opportunities:

- C220 Is That Legal?
- E230 Managing Upward
- C125 Hiring, Firing, and Everything In Between

E140 Building Organizational Excellence

Course Description:

Excellent organizations begin with a determination to be the best. When your board asks, “Are we the best?” know how to answer their question.

Course Objectives:

- Identifying the principles and best practices of successful organizations.
 - 25%
 - Characteristics of successful organizations
 - How are best practices determined? How do they evolve? Why are they important?

- Benchmarking your organization’s performance against the standards of other top organizations.
 - 50%
 - Suggested metrics
 - Conducting an organizational assessment
 - What is an assessment?
 - Why perform an assessment?
 - Internal involvement: staff, board, volunteers
 - External involvement: members, community, prospects
 - Outlining desired results
 - Performing a SWOT analysis
 - Organizational climate assessments/evaluations/measurements
 - Surveys, questionnaires, open forums, focus groups

- Implementing best practices.
 - 25%
 - Provide examples or case studies
 - Prioritize and focus
 - Communicate practices to internal and external stakeholders
 - Celebrate and acknowledge milestones and accomplishments achieved
 - Highlight accreditation, certifications, recognitions, and/or awards opportunities

Suggested class exercises:

- Case study (of a dysfunctional organization, then test knowledge learned)
- Benchmarking activity
- Examples of best practices in chambers and associations – provide a reading list

E142 Fundamentals of Community and Economic Development

Course Description:

Learn the fundamentals of community and economic development to enhance your organization's relevance.

Course Objectives:

- Defining economic development, including the various types and forms.
 - 50%
 - Definitions of and differences between community development and economic development
 - Explain different organizational structures for economic development groups. Public, private, etc.
 - Key trends among economic development organizations

- Developing existing business retention and expansion programs.
 - 25%
 - Identifying and qualifying prospects/developing marketing strategies with job creation as a top priority
 - Developing key performance indicators to assess your economic development marketing plan
 - Programs within economic development: retention and expansion, workforce development, entrepreneur training, leadership training

- Building collaborative economic development relationships and receiving examples of funding structures for economic development organizations.
 - 25%
 - Funding methods for economic development corporations: public, private, foundations, etc.
 - Importance of regional partnerships
 - Use of public and private funding for economic development

Additional learning opportunities:

- E342 Advanced Strategies of Community and Economic Development

E161 Business Communication Technology Trends (#OrgComm)

Course Description:

Keeping up with technology and social media can be challenging in any industry. Discover the latest trends to effectively and efficiently grab the attention and esteem of your members.

Course Objectives:

- Understanding current trends in technology and social media.
 - 33%
 - Cloud technology
 - Mobile responsiveness
 - Visual social media
 - How different generations use technology

- Linking your organizational strategy to the use of technology and social media.
 - 34%
 - Understanding analytics
 - Recognizing how your target audience utilizes your technology and social media
 - Knowing how to tie back your use of technology to achieving strategic organizational goals

- Reaching your audience with the latest technology and social media tools.
 - 33%
 - Social media outlets (e.g. Facebook, Twitter, Periscope, LinkedIn, Instagram, Blogs)
 - Social media tools (e.g. Canva, Hootsuite, Piktochart, etc.)
 - Website technologies

E163 Communicating Through the Media

Course Description:

There are times when you want or need to be out front on an issue and times when the best defense is a good offense. Learn how to maximize, or minimize, attention on an issue or event with the media.

Course Objectives:

- Understanding the vehicles for sending your message.
 - 35%
 - Determine best approach(es):
 - Editorials/op-ed
 - News release
 - Radio
 - Social media
 - Email campaign

- Communicating your message with impact to different media outlets.
 - 35%
 - Understand the self-interests of the “messengers” (media you want to deliver your message) and tailor your pitch to be relevant to them
 - Reinforce your message by being prepared and following up
 - Know the “mood” of the issue
 - Be honest
 - Leave a lasting impression

- Messaging with maximum preparation.
 - 30%
 - Understand the purpose of your message and the self-interests of the intended audience
 - Plan for obstacles
 - Create an action plan and distribute to all essential employees
 - Create briefing kits/one-pagers on key issues provided to employees
 - Understand both sides of the issue

E180 Building Better Boards and Committees

Course Description:

Learn to build strong boards and committees from recruiting the right people to successfully orienting board and committee members and planning for succession.

Course Objectives:

- Recruiting board members that reflect the diversity of your members.
 - 20%
 - Understanding the make-up of your members
 - Tools for recruitment

- Structuring a board or committee orientation program and setting expectations.
 - 40%
 - Communicating the right roles and responsibilities
 - Setting expectations of volunteers
 - How to hold board members accountable
 - Tips on securing time and financial commitments from new volunteers

- Coaching the board or committee to think strategically and prepare for succession.
 - 40%
 - Preparing young professionals to become leaders
 - Effective board retreats
 - Strategic planning techniques
 - Board engagement

Suggested class exercises:

- Discussion of board size, governance styles, and challenges
- Bring sample based orientation manual to class

Additional learning opportunities:

- C180 Guide to Governance
- C380 Volunteer Management

E210 Executive Finance

Course Description:

Executives who ignore key financial compliance issues can end up with unanswered questions in front of the board, empty corporate accounts, fired, or even jailed. This course covers advanced compliance and financial issues to keep you out of trouble.

Course Objectives:

- Identifying and documenting unrelated business income tax.
 - 20%
 - What is UBIT (unrelated business income tax)?
 - Definitions
 - Examples
 - Excluded activities
 - Sponsorships vs. advertising
 - Internet

- Recognizing how audits have changed in recent years and how to be better prepared to meet the new standards.
 - 20%
 - Finding an auditor
 - Audit committees
 - Audit reports
 - Opinion
 - Internal Controls (SAS 112 Letter)
 - Required Communications (SAS 114 Letter)

- Understanding the impact of the Form 990 on your organization.
 - 60%
 - Overview of federal forms:
 - Form 990N
 - Form 990EZ
 - Form 990

Suggested class exercises:

- Form 990 case study

Additional learning opportunities:

- C110 Financial Fitness
- C220 Is That Legal?
- C310 Budgeting and the Bottom Line

E211 Sponsorship Solicitation

Course Description:

Sponsoring events, publications, and programs can be a significant source of revenue. Learn how to structure sponsorship opportunities, develop a price, and solicit the right organizations to meet your goals.

Course Objectives:

- Developing sponsorship pricing structures, factors, and packaging.
 - 30%
 - Difference between sponsorship and advertisements
 - Finding a structure that's right for you
 - Key performance indicators of a successful sponsorship program

- Identifying the right organizations to solicit sponsorship.
 - 30%
 - Building partnerships to improve sponsor relations
 - Understanding the target audience of your event, publication, or program

- Making the sponsorship sales pitch and showing the return on investment.
 - 40%
 - Sponsorship menu
 - Evaluating the best time to make “the ask”
 - Determining the best person to make “the ask”
 - The plan for recognizing sponsors in a mutually beneficial fashion

Suggested class exercises:

- Share unique approaches to selling

Additional learning opportunities:

- E110 Revving your Revenue Stream

E230 Managing Upward

Course Description:

You are in charge of your performance and career development. Discover new ways of working with your supervisor to build cooperation and achieve success that benefits both of you.

Course Objectives:

- Understanding your manager and building the relationship.
 - 40%
 - Basic communication tips
 - Finding common ground
 - Seek to understand your manager's style
 - Positively adapting to the work style of another

- Developing your value to your organization.
 - 30%
 - Develop your personal brand
 - Manage up to stand out
 - Implement strategies to exceed expectations

- Building trust with your manager.
 - 30%
 - Avoid office politics
 - Learn the basics of trust building
 - Be trustworthy

Suggested class exercises:

- Role playing

Additional learning opportunities:

- C130 Unleash the Leader Within
- C150 Communicating with Confidence
- C230 Managers Who Motivate
- E350 The Art of Persuasion and Negotiation

E240 Strong Associations for the Future

Course Description:

Government regulation, technology, public trust, volunteerism, and a host of other issues affect the relevance and viability of associations. Become aware of key trends and issues that impact associations and discuss steps to ensure the future of the association industry.

Course Objectives:

- Examining marketplace trends in the association industry—income, revenue, and membership metrics.
 - 33%
 - Causes
 - Implications

- Identifying shifts in trends to ensure that your organization stays ahead of the curve and delivers member value.
 - 33%
 - Shifts in:
 - Marketing
 - Meetings and events
 - Learning
 - Technology

- Investigating innovative programs, governance, and operating procedures of trailblazing associations.
 - 34%
 - Discuss potential gains of groundbreaking practices as well as the risks involved
 - Tips on implementing creative solutions to problems
 - Examples of innovative programs from associations

Suggested class exercises:

- Brainstorming
- Case study of trailblazing associations
- Review bibliography of articles on Association Trends

Additional learning opportunities:

- C441 Industry Forecast

E241 Strong Chambers for the Future

Course Description:

Government regulation, technology, public trust, volunteerism, and a host of other issues affect the relevance and viability of chambers. Become aware of key trends and issues that impact chambers and discuss steps to ensure the future of the chamber industry.

Course Objectives:

- Understanding income, membership, and competitive marketplace trends in the chamber industry.
 - 30%
 - Causes and implications of the above mentioned trends
 - Impact trends have on how you operate
 - Understand how relevance is related to income, membership, and competitive marketplace advantage

- Identifying shifts in trends to ensure that your organization stays ahead of the curve and delivers member value.
 - 20%
 - How do you know something is a trend?
 - Why is understanding and recognizing trends important?

- Examining innovative programs, governance, and operating procedures of trailblazing chambers.
 - 50%
 - Discuss potential gains of groundbreaking practices as well as the risks involved
 - Tips on implementing creative solutions to problems
 - Innovative programs from chambers of commerce (sharing of best practices)
 - The benefits and risks of innovative programs

Suggested class exercises:

- Brainstorming
- Case study of trailblazing chambers

Additional learning opportunities:

- C441 Industry Forecast

Suggested resources:

- ACCE Horizons 2025 Report

E243 Developing a Competitive Workforce

Course Description:

Employers across the nation agree that a qualified and well-trained workforce is key to sustained growth and competitiveness. Learn the various roles your organization can play in this arena and the resources you can tap.

Course Objectives:

- Understanding workforce development activities and terminology.
 - 25%
 - Basic concepts
 - Recent legislative activity

- Identifying common initiatives and roles of chambers in workforce development.
 - 40%
 - Key trends
 - How your organization can make an impact
 - Partnering with local government and neighboring community initiatives

- Exploring resources to assist you in your workforce development program.
 - 30%
 - USCCF resources

Additional learning opportunities:

- C261 Events: Strategy and Operations
- C270 Effective Government Affairs Programs
- C360 Innovate or Die
- C441 Industry Forecast

E244 Using Data to Grow and Sustain Your Organization

Course Description:

The flow of knowledge is a competitive advantage. This course explores a people-first and principle-centered approach to leverage knowledge in nonprofits.

Course Objectives:

- Evaluating relationship management systems and information that should be captured.
 - 33%
 - Key functions of a CRM System
 - Possible rubrics or criterion evaluation to help identify functions or data that are most important
 - Identify the types of data that are most important to be included in a CRM system
 - Discover tools that can be used to summarize information and help make recommendations
 - Additional management modules such as reports, communications, accounting, events, and sponsorship components that may be found in more robust systems
 - Process for data cleanup and integrity

- Understanding how to link member data and forecast trends.
 - 33%
 - Samples of reports to demonstrate their use in forecasting
 - Data uses in forecasting for planning marketing, budgeting, communicating, and engagement
 - Data mining and how it is used to generate new leads
 - Market segmentation and targeting audiences

- Developing and analyzing data through surveys and other research tools.
 - 34%
 - Methods for collecting data
 - Sample questions to receive desired data
 - Identify gaps in existing member data and develop a strategy to minimize those gaps
 - Explore primary and secondary sources of information to enhance existing member data
 - Evaluating your data collection process and the data received
 - Develop strategy for dissemination of insights throughout the organization and/or industry

Additional learning opportunities:

- C185 Recruit, Engage, and Retain Your Members
- E380 Delivering Value

E250 PACs and Political Endorsements

Course Description:

Is your organization ready to begin a PAC and engage in endorsements? This class will provide step-by-step instruction on how to establish and grow successful political action committees and endorse candidates.

Course Objectives:

- Structuring the foundation of a government affairs program.
 - 33%
 - Who's involved?
 - What potential issues should be addressed?
 - What are the legal, financial, regulatory, and political implications?

- Creating and maintaining a PAC.
 - 34%
 - State and federal rules
 - Gaining the support of your board

- Building an airtight endorsement strategy.
 - 33%
 - Are they right for you?
 - Developing and maintaining written criteria for the endorsement process

Additional learning opportunities:

- C270 Effective Government Affairs Programs
- C470 Advocacy and Alliances

E310 Dues and Don'ts

Course Description:

Do you plan to reevaluate or restructure your organization's membership investment schedule? This session looks at the major issues in developing a dues schedule and the approaches that different organizations use.

Course Objectives:

- Evaluating advantages and risks of various dues schedules.
 - 25%
 - Types of dues schedules
 - Types of dues structures

- Identifying steps for conducting a review of your organization's dues structure.
 - 50%
 - How often should you review the dues structure
 - Key players to involve
 - Best practices

- Implementing techniques to ensure smooth implementation of a dues schedule change.
 - 25%
 - How to market a new dues schedule to your board
 - How to market a new dues schedule to your members

Additional learning opportunities:

- C310 Budgeting and the Bottom Line

E330 Learning to Let Go

Course Description:

The stress that comes from being responsible and accountable for performance can hinder success and job satisfaction. Delegation gives others a greater stake in organizational outcomes and can increase productivity. Explore strategies for empowering others to assume more responsibility.

Course Objectives:

- Identifying what and what not to delegate.
 - 25%
 - Steps of delegation
 - Work/life balance
 - Barriers to effective delegation
 - Frequent errors in delegation with impacts and remedies
 - Recognizing what others aside from you can do

- Understanding how to delegate to the right person at the right time.
 - 50%
 - Are they ready to listen?
 - Do they have the knowledge and skills needed?
 - Do they have the time?
 - Match the requirements of the job to the person
 - Create a timeline and a plan to follow-up when delegating
 - Understand the work style of those you delegate to

- Implementing ways to improve staff accountability.
 - 25%
 - Tips and tools
 - How to develop evidence based performance measures to ensure performance aligns with expectations

Suggested class exercises:

- Create a delegation checklist/plan involving current staff

E331 CEO Lessons Learned

Course Description:

Learn how to thrive as a nonprofit executive. Gain insight and refinement as an executive in the industry. Tips, lessons, and stories are captured and shared during this interactive session.

Course Objectives:

- Sharing best practices.
 - 40%
 - Capture and share advice and insights (“What I learned the hard way”)
 - Simple do’s and don’ts
 - How to handle the jump from staff to CEO

- Exploring habits and behaviors of nonprofit executives, from challenges to everyday opportunities.
 - 30%
 - Provide examples of how to change and implement habits/behaviors toward greater success
 - Capture and share good and bad virtues
 - How to handle the bad days
 - Moments of success – how to handle them

- Assessing your career stage and growth opportunities.
 - 30%
 - Dialogue on stages and phases of one’s career
 - Inventory arenas of personal growth
 - Skills for the future

Suggested class exercises:

- Facilitated discussion of major oops and faux pas

Additional learning opportunities:

- C490 Organization Leadership for the Future

E342 Advanced Strategies of Community and Economic Development

Course Description:

Expand your organization's role in economic development and learn strategies to compete globally.

Course Objectives:

- Structuring a deal, identification, and use of incentives.
 - 45%
 - Product identification
 - The key elements of “the deal”
 - Types of incentives, why they are needed, and when they are appropriate to be utilized
 - Clawbacks or other required benchmarks for performance

- Understanding redevelopment, revitalization, and regionalism.
 - 35%
 - The differences between redevelopment vs. new development
 - The redevelopment process
 - Blight and its negative impact on communities; identifying the need and creating the tools/resources to fix it
 - How do long range planning and city codes play into redevelopment?
 - The regionalism concept (provide examples of successful regions)
 - Dos and don'ts of successful regions

- Utilizing technology in economic development.
 - 20%
 - The use of social media in economic development
 - Databases and other resources for business (e.g. ERSI, real estate databases)
 - Technology platforms that support economic development

Additional learning opportunities:

- E142 Fundamental Strategies of Community and Economic Development

E350 The Art of Persuasion and Negotiation

Course Description:

Persuasion and negotiation require patience and determination. Learn to shift opinions through key people, case studies, power words, and presentations. Convince others to step up and take on new initiatives. Learn how to obtain the results you want through negotiation.

Course Objectives:

- Understanding the types of decision makers and how they can be most effectively persuaded.
 - 25%
 - How to identify decision makers
 - How to maintain relationships with decision makers

- Identifying words and techniques to convince others to take action.
 - 50%
 - Body language
 - Persuasive vocabulary
 - Best methods of communication

- Implementing a plan of action for negotiations.
 - 50%
 - Timeline for plan of action
 - Tips for following up on negotiations

E360 Strategic Communications

**Previous to 2015, this course was titled Rethinking Communications*

Course Description:

Your communications strategy needs to effectively convey organization products, programs, and services. Learn to evaluate your communications and marketing strategy to ensure that your organization is properly branded to reach its critical audience.

Course Objectives:

- Evaluating and structuring an effective communication strategy.
 - 25%
 - The attributes that make up a communications strategy
 - Tools and/or methods for measuring effective communication (e.g. audience penetration, readership, and action against desired outcomes)

- Targeting the right audience for various communications efforts.
 - 25%
 - How to identify audience segments or targets based on desired communication outcomes
 - How audience-specific variations of the same message can be effective in communicating

- Determining the appropriate brand within the market.
 - 50%
 - Review of branding activities as a communication strategy
 - How to identify an organization's brand
 - Developing a brand and aligning messaging to support the brand
 - Different communication strategies to match branding objectives

Additional learning opportunities:

- C150 Communicating with Confidence
- C260 Marketing Strategies
- E163 Communicating Through the Media

E362 Policy Development and Implementation

Course Description:

Policies and procedures exist to protect the organization and the professionals within it. Determine the differences between policies and procedures and learn how to implement an appropriate structure in your organization.

Course Objectives:

- Identifying differences between policies and procedures.
 - 35%
 - Distinguishing policies from procedures, positions, practices, and precedents
 - Process for policy development

- Exploring the process for implementing policies.
 - 35%
 - Archiving policies for quick reference
 - Policy mistakes
 - Policy process

- Understanding risk management.
 - 30%
 - Policies as a form of risk management
 - The most common policies among organizations
 - The IRS policy recommendations

Additional learning opportunities:

- C180 Guide to Governance

E380 Delivering Value

Course Description:

Nonprofit organizations face an increasingly competitive market for members and customers. Learn how to develop your organization's value proposition and convey the significance of your services to current and prospective members and customers.

Course Objectives:

- Identifying your value proposition.
 - 50%
 - Students should gain a clear understanding of what their organization's value proposition is
 - Golden handcuff principle

- Communicating your value proposition.
 - 25%
 - Determine the best way to communicate value to your members

- Measuring your value proposition.
 - 25%
 - Why you can't be all things to all people
 - Hedgehog theory – focus on what you know best and what you are good at

Suggested class exercises:

- Group exercise – practice identifying, communicating, and measuring value proposition

Additional learning opportunities:

- E360 Strategic Communications
- C185 Recruit, Engage, and Retain Your Members

CURRICULUM RECOMMENDATIONS



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

BACKGROUND

Based on all feedback received from attendees, faculty, and volunteers during 2016, we would like to review the following courses:

1. C430 Becoming a Strategic Manager
2. C380 Volunteer Management
3. C470 Advocacy and Alliances
4. C490 Organization Leadership for the Future
5. C261 Event: Strategy and Operations
6. E163 Communicating Through the Media
7. E161 Business Communication Technology Trends (#OrgComm)

C430 Becoming a Strategic Manager

Suggested Change: Title and course description

Change the title to “Strategic Leadership.” Also change the word “manager” to “leader” in the course description.

Why: Faculty members have shared the need to differentiate between leadership and management. C230 Managers Who Motivate covers topics on management. To avoid duplicate material, C430 should focus on strategic leadership.

Suggested Change: Consider possible curriculum overlap with C230 Managers Who Motivate.

Why: C430 and C230 both include general management and accountability themes. The committee should discuss whether any curriculum overlap exists. If so, the objectives in one or both courses should be updated.

Full class outline for C430 can be found on page 21 of the Course Syllabus.

Full class outline for C230 can be found on page 9 of the Course Syllabus.

C380 Volunteer Management

Suggested Change: Title

Change the title to “Volunteer Development.”

Why: The objectives center on developing volunteers versus simply managing volunteers, so the title should reflect the objective language.

Suggested Change: Objectives

Update the objectives to reflect that all levels of volunteers (i.e. board, committee, ambassador, etc.) should be address in the course.

CURRICULUM RECOMMENDATIONS



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

Why: Attendee feedback indicated some faculty members focused primarily on boards, while others focused on non-leadership volunteers. Clarifying the objectives to show that all levels of volunteers should be discussed will better guide the faculty.

Full class outline can be found on page 19 of the Course Syllabus.

C470 Advocacy and Alliances

Suggested Change: Objective #3

Change objective #3 to “Managing and maintaining grassroots networks.”

Why: The course description indicates the class is meant to instruct attendees on the next steps *after* their advocacy program is in place. The objective should reflect the idea that the grassroots network is already up and running and should help attendees learn how to manage and maintain the network.

Suggested Change: Consider possible curriculum overlap with C270 Effective Government Affairs Programs.

Why: C270 and C470 both include objectives relating to grassroots networks. The committee should discuss whether any curriculum overlap exists. If so, the objectives in one or both courses should be updated.

Full class outline for C470 can be found on page 25 of the Course Syllabus.

Full class outline for C270 can be found on page 13 of the Course Syllabus.

C490 Organization Leadership for the Future

Suggested Change: Objective #1

Change objective #1 to “Utilizing situational awareness” and consider updating sub bullet points accordingly.

Why: “Situational awareness” is more appropriate to the course than “environmental scanning.”

Suggested Change: Objectives

Discuss and update objectives to reflect a dive deeper into leadership topics.

Why: Attendee feedback indicates a desire for the class content to have more depth and substance.

Full class outline can be found on page 26 of the Course Syllabus.

CURRICULUM RECOMMENDATIONS



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C261 Events: Strategy and Operations

Suggested Change: Objectives
Discuss and update objectives.

Why: Attendee feedback indicates they would like the class content to have more depth and substance. Faculty feedback indicates the class may be too elementary for larger organizations.

Full class outline can be found on page 12 of the Course Syllabus.

E163 Communicating Through the Media

Suggested Change: Objective #1 sub bullet points
Consider updating objective #1 sub bullet points to include other forms of media (i.e. bloggers).

Why: Faculty feedback notes that journalism as a profession is shrinking and journalistic practices are being incorporated by companies, brands, chambers, and associations. Recognizing the changing nature of media in the curriculum would be relevant and helpful.

Suggested Change: Update objective #2
Consider updating objective #2 to include the idea that communication is a two-way street.

Why: Faculty feedback notes communication in a digital world is more than ever a two-way street. Using digital media to create listening devices so attendees know what is being said about them is essential to attendees proactively promoting their values. For example, Google Alerts set up for board member names, staff names, etc. will help attendees know when bloggers are talking about their brands.

Full class outline for C470 can be found on page 33 of the Course Syllabus.

E161 Business Communication Technology Trends (#OrgComm)

Suggested Change: None

Why: Since this class was updated last year, consider a committee discussion to affirm the changes made last year should remain and evaluate whether any additional changes should be made.

Full class outline for C470 can be found on page 32 of the Course Syllabus.

Faculty Course Survey

1. Do you feel the time allotment for each course objective is appropriate?
2. Would you recommend changing any of the course objectives or course title? If yes, how so?
3. Were you able to present your material with a focus on both associations and chambers?
4. Were you able to release students on time for breaks and the end of class? If not, why?
5. What percentage of the time was used for:

 Introductions ___% + Presenting ___% + Facilitating ___% + Group Exercises ___% = 100%
6. Would you recommend this course remain in the curriculum? If you would like it to change, please share your thoughts.
7. Were you able to stay on topic, or did you have to go off topic? If so, why?
8. Do you feel the curriculum was well received? If not, why?
9. Did you encounter any challenges?
10. Did you have everything you needed for the class on time?

Additional Comments:

COURSE AUDIT FORM

****Course Description and Objectives can be found in the Institute Planner****

1. Did the course cover all of the objectives and allocate the appropriate amount of time for each?
2. Was the course helpful for and geared to both association and chamber professionals?
3. If you were to add an objective to this course, what would it be?
4. Do you think the objective you wrote above should replace one of the current objectives to better reflect industry trends and practices? If so, which objective should it replace?
5. What could be done to make this course more applicable to and in line with industry trends?
6. Was the theme of diversity discussed (if applicable to the subject matter)? If so, how? If not, was there a place where it could have been woven in?

Additional comments regarding the curriculum or instructor:

Auditor: _____
Organization: _____
Course: _____
Instructor: _____
Site: _____

Course Code: C150 Instructor: JUSTIN PATTON

Class Section: 1-1

Course Title: COMMUNICATING WITH CONFIDENCE

Institute Location: Winter Midwest Southeast West Northeast

To assist Institute in its commitment to continual improvement, please mark the choice which best corresponds to your answer or opinion. Mark circles like this not like this

About the Instructor

	Strongly Agree	Agree	Somewhat Agree Somewhat Disagree	Disagree	Strongly Disagree
The instructor tailored the course to Chamber/Association needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The instructor welcomed questions and encouraged participation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would recommend this instructor to teach this course again.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

About the Course

	Strongly Agree	Agree	Somewhat Agree Somewhat Disagree	Disagree	Strongly Disagree
The course addressed concepts relevant to my professional development.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The course was conducted at a suitably challenging level for me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would recommend this course for Chamber/Association professionals like myself.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

About the Course Objectives

	Strongly Agree	Agree	Somewhat Agree Somewhat Disagree	Disagree	Strongly Disagree
1. The instructor adequately covered the following course objective: HONING YOUR VERBAL AND NON-VERBAL COMMUNICATION SKILLS.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. The instructor adequately covered the following course objective: DELIVERING YOUR IDEAS AS MESSAGES THAT RESONATE.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. The instructor adequately covered the following course objective: BUILDING AN EFFECTIVE PRESENTATION.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Suggestions and Comments

Please use this area to provide further comments in regard to this course and/or instructor. Your feedback is very important to the continued improvement of our academic program.



ABSENCE RESPONSE PLAN



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

IF LESS THAN HALF A CLASS IS MISSED...

The attendee must research and write a blog on the topic of the class. This blog must include three outside sources and follow all IOM Blog guidelines and procedures.

IF MORE THAN HALF A CLASS IS MISSED...

The attendee must attend a seminar on the subject matter of the class and then write a blog. The seminar must be approved by Institute staff before the attendee can participate in the seminar to make up missed class time.

MAKE-UP BLOGS: GUIDELINES AND PROCEDURES

Guidelines

- Blogs should be 200-500 words.
- Blogs should reference three outside sources.

Procedure for submission

- Email your blog in a word document to Carly Flick at cflick@usuchamber.com. In the body of the email, please indicate your name, site attended, class missed, and amount of class time missed.
- Please also submit a high-res headshot and short bio.

Post-submission process

- You will receive a direct link to your blog via email on the day it is published.
- Your blog may be pushed out through social media once it is published.
- *Please note: Not all make-up blogs are published.*

Important Policy Notes

- Institute reserves the right to edit for length or grammar without changing the integrity of the content.
- Because Institute is a program of the U.S. Chamber of Commerce Foundation, a 501(c)3 affiliate of the U.S. Chamber of Commerce, Institute is not able to publish content that is of a political nature.
- If your blog does not meet the required standards for make-up work, Institute staff may send the blog back to you and ask for revisions to be made.

Institute's blog can be found at: institute.uschamber.com/blog

Winter 2016

	Monday January 4 8:00 AM	Monday January 4 12:45 PM	Tuesday January 5 8:00 AM	Tuesday January 5 12:00 PM	Wednesday January 6 8:00 AM	Wednesday January 6 10:30 AM	Wednesday January 6 1:00 PM	Thursday January 7 8:00 AM	Thursday January 7 12:45 PM
1 - 1	C150 Communicating with Confidence J. Patton	C125 Hiring, Firing, and Ev. Between D. Snellen	C130 Unleash the Leader Within L. Spears	E110 Revving Your Revenue Stream P. McGaughey	E210 Executive Finance M. Gellman	E310 Dues and Don'ts M. Varney	C110 Financial Fitness M. Gellman	C185 Recruit, Engage, & Retain Members M. Varney	C180 Guide to Governance F. Kenny
1 - 2	C125 Hiring, Firing, and Ev. Between D. Snellen	C130 Unleash the Leader Within L. Spears	C110 Financial Fitness M. Gellman	E120 Executive Law S. Erkonen	E211 Sponsorship Solicitation K. Sexton	E330 Learning to Let Go D. Aaker	C150 Communicating with Confidence B. Graham	C180 Guide to Governance F. Kenny	C185 Recruit, Engage, & Retain Members M. Varney
2 - 1	C250 Customer Service Inside and Out D. Aaker	C260 Marketing Strategies M. Lucas	C220 Is That Legal? S. Erkonen	E126 Dealing with Challenging Employees L. Spears	E230 Managing Upward C. Hight	E331 CEO Lessons Learned M. McCormick	C230 Managers Who Motivate S. Halter	C270 Effective Govmt Affairs Programs D. Kilby	C261 Events: Strategy and Operations P. McGaughey
2 - 2	C261 Events: Strategy and Operations N. Kieffer	C250 Customer Service Inside and Out D. Aaker	C230 Managers Who Motivate D. Snellen	E140 Building Org. Excellence B. Harris	E240 Strong Assoc. for the Future B. Harris	E342 Advanced Strategies of Com. & Ec. Dev. M. Lucas	C220 Is That Legal? S. Erkonen	C260 Marketing Strategies K. Sexton	C270 Effective Govmt Affairs Programs D. Kilby
3 - 1	C310 Budgeting and the Bottom Line M. Gellman	C360 Innovate or Die C. Hight	C340 Strategic Planning B. Harris	E142 Fundamentals of Com. & Ec. Dev. M. Lucas	E241 Strong Chambers for the Future K. Nastasi	E350 The Art of Persuasion and Negotiation P. McGaughey	C330 Everyday Ethics D. Aaker	C380 Volunteer Management M. McCormick	C341 Win-Win Partnerships L. Kerns
3 - 2	C360 Innovate or Die C. Hight	C340 Strategic Planning B. Harris	C330 Everyday Ethics D. Aaker	E161 Business Comm. Tech. Trends #OrgComm B. Baker	E243 Developing a Competitive Workforce C. Codella	E350 The Art of Persuasion and Negotiation S. Swafford	C341 Win-Win Partnerships L. Kerns	C310 Budgeting and the Bottom Line M. Gellman	C380 Volunteer Management M. McCormick
4 - 1	C460 Integrating Strategic Tech. Solutions B. Baker	C430 Becoming a Strategic Manager J. Patton	C440 Collaborative Leadership B. Graham	E163 Communicating Through the Media K. Sexton	E244 Using Data to Grow & Sustain Your Org. B. Graham	E360 Strategic Communications K. Sexton	C470 Advocacy and Alliances R. Medler	C441 Industry Forecast L. Kerns	C490 Organization Leadership for the Future B. Thomas
4 - 2	C470 Advocacy and Alliances R. Medler	C460 Integrating Strategic Tech. Solutions B. Baker	C430 Becoming a Strategic Manager J. Patton	E180 Building Better Boards and Committees D. Snellen	E250 PACs and Political Endorsements R. Medler	E380 Delivering Value R. Towle	C441 Industry Forecast C. Hight	C440 Collaborative Leadership B. Graham	C490 Organization Leadership for the Future M. Lucas
	11:30 AM	4:15 PM	11:30 AM	2:45 PM	10:00 AM	12:30 PM	4:15 PM	11:30 AM	4:00 PM

Midwest 2016

	Monday June 13 8:00 AM	Monday June 13 12:30 PM	Tuesday June 14 8:00 AM	Tuesday June 14 12:30 PM	Wednesday June 15 8:00 AM	Wednesday June 15 10:30 AM	Wednesday June 15 1:00 PM	Thursday June 16 8:00 AM	Thursday June 16 12:30 PM
1 - 1	C125 Hiring, Firing, and Ev. Between D. Snellen	C150 Communicating with Confidence B. Graham	C110 Financial Fitness B. Foulks	E126 Dealing with Challenging Employees D. Snellen	E210 Executive Finance B. Foulks	E310 Dues and Don'ts M. Varney	C130 Unleash the Leader Within D. Consolino	C180 Guide to Governance B. Harris	C185 Recruit, Engage, & Retain Members M. Varney
1 - 2	C150 Communicating with Confidence B. Graham	C125 Hiring, Firing, and Ev. Between D. Snellen	C130 Unleash the Leader Within D. Consolino	E140 Building Org. Excellence B. Harris	E211 Sponsorship Solidiation K. Sexton	E330 Learning to Let Go D. Consolino	C110 Financial Fitness B. Foulks	C185 Recruit, Engage, & Retain Members M. Varney	C180 Guide to Governance B. Harris
2 - 1	C220 Is That Legal? D. Goch	C260 Marketing Strategies K. Sexton	C250 Customer Service Inside and Out D. Aaker	E142 Fundamentals of Comm. and Ec. Dev. M. Dobson	E240 Strong Assoc for the Future B. Harris	E342 Adv. Strategies of Comm. & Ec. Dev. M. Dobson	C270 Effective Govmt Affairs Programs B. Taylor	C230 Managers Who Motivate Ali Crain	C261 Events: Strategy & Operations P. McGaughey
3 - 1	C380 Volunteer Management A. Crain	C330 Everyday Ethics D. Aaker	C360 Innovate or Die B. Graham	E161 Business Comm. Tech. Trends #OrgComm M. Longenecker	E241 Strong Chambers for the Future P. McGaughey	E360 Strategic Communications K. Sexton	C341 Win-Win Partnerships Regents	C340 Strategic Planning P. McGaughey	C310 Budgeting and the Bottom Line B. Foulks
4 - 1	C470 Advocacy and Alliances B. Malkasian	C420 Current Legal Issues Facing Your Org. D. Goch	C430 Becoming a Strategic Manager D. Snellen	E163 Communicating through the Media K. Sexton	E243 Developing a Competitive Workforce C. Codella	E362 Policy Development & Implementation B. Harris	C441 Industry Forecast P. McGaughey	C460 Integrating Strategic Tech. Solutions K. Sexton	C490 Organization Leadership for the Future B. Thomas
				E180 Building Better Boards and Committees D. Aaker	E244 Using Data to Grow & Sustain Your Org. B. Graham	E380 Delivering Value R. Towle			
	11:30 AM	4:00 PM	11:30 AM	2:30 PM	10:00 AM	12:30 PM	4:30 PM	11:30 AM	4:00 PM

Southeast 2016

	Monday June 27 8:00 AM	Monday June 27 12:30 PM	Tuesday June 28 8:00 AM	Tuesday June 28 12:30 PM	Wednesday June 29 8:00 AM	Wednesday June 29 10:30 AM	Wednesday June 29 1:00 PM	Thursday June 30 8:00 AM	Thursday June 30 12:30 PM
1-1	C125 Hiring, Firing, and Ev. Between C. Kuhl	C110 Financial Fitness M. Gellman	C180 Guide to Governance B. Harris	E110 Revving Your Revenue Stream C. Ewart	E210 Executive Finance M. Gellman	E310 Dues and Don'ts C. Ewart	C150 Communicating With Confidence J. Patton	C185 Recruit, Engage, & Retain Members C. Ewart	C130 Unleash the Leader Within L. Spears
1-2	C180 Guide to Governance B. Harris	C125 Hiring, Firing, and Ev. Between C. Kuhl	C110 Financial Fitness M. Gellman	E120 Executive Law S. Erkonen	E211 Sponsorship Soliditation P. McGaughey	E330 Learning to Let Go C. Kuhl	C185 Recruit, Engage, & Retain Members A. Medlin	C130 Unleash the Leader Within L. Spears	C150 Communicating With Confidence J. Patton
1-3	C180 Guide to Governance J. Arthur	C185 Recruit, Engage, & Retain Members B. Copeland	C125 Hiring, Firing, and Ev. Between C. Kuhl	E126 Dealing With Challenging Employees C. Kuhl	E230 Managing Upward C. Newton	E331 CEO Lessons Learned B. Pawlucy	C130 Unleash the Leader Within L. Spears	C150 Communicating With Confidence A. Medlin	C110 Financial Fitness M. Gellman
2-1	C261 Events: Strategy & Operations M. Yancy	C250 Customer Service Inside and Out D. Aaker	C270 Effective Govmt Affairs Programs M. Hallmark	E140 Building Org. Excellence P. McGaughey	E240 Strong Associations for the Future B. Harris	E342 Adv. Strategies of Comm. and Ec. Dev. M. Akridge	C220 Is That Legal? S. Erkonen	C230 Managers Who Motivate S. Swafford	C260 Marketing Strategies C. Newton
2-2	C250 Customer Service Inside and Out D. Aaker	C261 Events: Strategy & Operations P. McGaughey	C220 Is That Legal? S. Erkonen	E142 Fundamentals of Comm. and Ec. Dev. B. Daniels	E241 Strong Chambers for the Future (a) A. Medlin	E350 The Art of Persuasion and Negotiation P. McGaughey	C270 Effective Govmt Affairs Programs M. Hallmark	C260 Marketing Strategies C. Newton	C230 Managers Who Motivate J. Arthur
3-1	C310 Budgeting and the Bottom Line M. Gellman	C341 Win-Win Partnerships S. Swafford	C380 Volunteer Management C. Kennedy	E161 Business Comm. Tech. Trends #OrgComm R. Chase	E241 Strong Chambers for the Future (b) C. Ewart	E360 Strategic Communications C. Newton	C330 Everyday Ethics D. Aaker	C360 Innovate or Die B. Pawlucy	C340 Strategic Planning P. McGaughey
3-2	C341 Win-Win Partnerships S. Swafford	C340 Strategic Planning B. Harris	C330 Everyday Ethics D. Aaker	E163 Communicating Through the Media B. Copeland	E243 Developing a Competitive Workforce J. Francis	E362 Policy Development and Implementation B. Harris	C380 Volunteer Management C. Kennedy	C310 Budgeting and the Bottom Line M. Gellman	C360 Innovate or Die B. Pawlucy
4-1	C470 Advocacy and Alliances J. Kavinoky	C420 Current Legal Issues Facing Your Org. S. Erkonen	C460 Integrating Strategic Tech. Solutions R. Chase	E180 Building Better Boards and Committees S. Swafford	E244 Using Data to Grow & Sustain Your Org. F. Kenny	E380 Delivering Value (a) J. Arthur	C441 Industry Forecast F. Kenny	C430 Becoming a Strategic Manager J. Patton	C490 Organization Leadership for the Future B. Thomas
4-2	C420 Current Legal Issues Facing Your Org. S. Erkonen	C470 Advocacy and Alliances J. Kavinoky	C460 Integrating Strategic Tech. Solutions F. Kenny		E250 PACs and Political Endorsements M. Hallmark	E380 Delivering Value (b) R. Towle	C430 Becoming a Strategic Manager S. Swafford	C441 Industry Forecast F. Kenny	C490 Organization Leadership for the Future B. Thomas
	11:30 AM	4:00 PM	11:30 AM	2:30 PM	10:00 AM	12:30 PM	4:30 PM	11:30 AM	4:00 PM

West 2016

	Monday July 11 8:00 AM	Monday July 11 12:30 PM	Tuesday July 12 8:00 AM	Tuesday July 12 12:30 PM	Wednesday July 13 8:00 AM	Wednesday July 13 10:30 AM	Wednesday July 13 1:00 PM	Thursday July 14 8:00 AM	Thursday July 14 12:30 PM
1 - 1	C180 Guide to Governance D. Moreno	C110 Financial Fitness M. Gellman	C150 Communicating with Confidence M. Lefebvre	E110 Revving Your Revenue Stream B. Lacy	E210 Executive Finance M Gellman	E330 Learning to Let Go D. Aaker	C130 Unleash the Leader Within J. McCrory	C125 Hiring, Firing, and Ev. Between C. Hight	C185 Recruit, Engage, & Retain Members J. Sandford
2 - 1	C270 Effective Govmt Affairs Programs D. Kilby	C260 Marketing Strategies M. Virgili	C250 Customer Service Inside and Out D. Aaker	E120 Executive Law S. Erkonen	E211 Sponsorship Solicitation C. Allen Dallas	E331 CEO Lessons Learned K. Hall	C220 Is That Legal? S. Erkonen	C230 Managers Who Motivate J. McCrory	C261 Events: Strategy & Operations C. Allen Dallas
3 - 1	C310 Budgeting and the Bottom Line M. Gellman	C330 Everyday Ethics D. Aaker	C340 Strategic Planning K. Hall	E126 Dealing with Challenging Employees M. Lefebvre	E230 Managing Upward J. McCrory	E342 Adv. Strategies of Comm & Economic Dev. B. Lacy	C341 Win-Win Partnerships B. Baker	C360 Innovate or Die C. Allen Dallas	C380 Volunteer Management J. McCrory
4 - 1	C430 Becoming a Strategic Manager M. Lefebvre	C460 Integrating Strategic Tech. Solutions B. Baker	C420 Current Legal Issues Facing Your Org. S. Erkonen	E140 Building Org. Excellence J. Sandford	E240 Strong Associations for the Future S. Swafford	E360 Strategic Communications M. Longenecker	C441 Industry Forecast C. Hight	C470 Advocacy and Alliances M. Virgili	C490 Organization Leadership for the Future B. Thomas
				E161 Business Comm. Tech. Trends #OrgComm B. Baker	E241 Strong Chambers for the Future K. Hall	E362 Policy Development & Implementation J. Sandford			
				E180 Building Better Boards and Committees D. Aaker	E243 Developing a Competitive Workforce C. Codella	E380 Delivering Value R. Towle			
	11:30 AM	4:00 PM	11:30 AM	2:30 PM	10:00 AM	12:30 PM	4:30 PM	11:30 AM	4:00 PM

Northeast 2016

	Monday August 1 8:00 AM	Monday August 1 12:30 PM	Tuesday August 2 8:00 AM	Tuesday August 2 12:30 PM	Wednesday August 3 8:00 AM	Wednesday August 3 10:30 AM	Wednesday August 3 1:00 PM	Thursday August 4 8:00 AM	Thursday August 4 12:30 PM
1-1	C150 Communicating with Confidence B. Graham	C180 Guide to Governance B. Harris	C125 Hiring, Firing, and Ev. Between K. Dunn	E120 Executive Law S. Erkonen	E210 Executive Finance M. Gellman	E310 Dues and Don'ts K. Sexton	C185 Recruit, Engage, & Retain Members J. Smikle	C130 Unleash the Leader Within J. McCrory	C110 Financial Fitness M. Gellman
1-2	C125 Hiring, Firing, and Ev. Between K. Dunn	C150 Communicating with Confidence B. Graham	C180 Guide to Governance B. Harris	E126 Dealing with Challenging Employees K. Dunn	E211 Sponsorship Solidation K. Sexton	E330 Learning to Let Go D. Aaker	C110 Financial Fitness M. Gellman	C130 Unleash the Leader Within J. Smikle	C185 Recruit, Engage, & Retain Members D. Sharpe
2-1	C270 Effective Govmt Affairs Programs P. McNamara	C260 Marketing Strategies K. Sexton	C220 Is That Legal? S. Erkonen	E140 Building Org. Excellence D. Aaker	E230 Managing Upward S. Katz	E331 CEO Lessons Learned F. Kenny	C230 Managers Who Motivate S. Katz	C261 Events: Strategy & Operations D. Sharpe	C250 Customer Service Inside and Out D. Aaker
3-1	C340 Strategic Planning B. Harris	C380 Volunteer Management C. Louder	C360 Innovate or Die B. Graham	E142 Fundamentals of Comm. and Ec. Dev. C. Wallace	E240 Strong Assoc. for the Future B. Harris	E350 The Art of Persuasion and Negotiation J. McCrory	C330 Everyday Ethics D. Aaker	C310 Budgeting and the Bottom Line M. Gellman	C341 Win-Win Partnerships J. McCrory
4-1	C441 Industry Forecast F. Kenny	C420 Current Legal Issues S. Erkonen	C460 Integrating Strategic Tech. Solutions F. Kenny	E161 Business Comm. Tech. Trends #OrgComm F. Kenny	E241 Strong Chambers for the Future F. Kenny	E360 Strategic Communications B. Graham	C470 Advocacy and Alliances S. Worth	C430 Becoming a Strategic Manager S. Katz	C490 Organization Leadership for the Future B. Thomas
				E163 Communicating Through the Media K. Sexton	E244 Using Data to Grow & Sustain Your Org. B. Graham	E362 Policy Development & Implementation D. Sharpe			
				E180 Building Better Boards and Committees J. Smikle	E250 PACs and Political Endorsements S. Worth	E380 Delivering Value R. Towle			
	11:30 AM	4:00 PM	11:30 AM	2:30 PM	10:00 AM	12:30 PM	4:30 PM	11:30 AM	4:00 PM