



GENERAL INFORMATION

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

AGENDA

BOARD OF TRUSTEES, BOARDS OF REGENTS, AND CURRICULUM COMMITTEE MEETINGS
SEPTEMBER 29 – SEPTEMBER 30, 2016
U.S. CHAMBER OF COMMERCE
WASHINGTON, DC

THURSDAY, SEPTEMBER 29

- 8:30 a.m. – 9:00 a.m. Continental Breakfast for the Curriculum Committee
3M/RJR
Curriculum Committee Members Only
- 9:00 a.m. – 12:00 p.m. Curriculum Committee Meeting
3M/RJR
Curriculum Committee Members Only
- 12:00 p.m. – 12:30 p.m. Joint Lunch
Hall of Flags
Board of Trustees, Boards of Regents, Curriculum Committee
- 12:30 p.m. – 4:00 p.m. Collaborative Session
Facilitated by Jill McCrory, President and Ringleader
Leadership Outfitters, Inc.
Hall of Flags
Board of Trustees, Boards of Regents, Curriculum Committee
- 6:30 p.m. – 9:00 p.m. Board Dinner
Carmines
Board of Trustees, Boards of Regents, Curriculum Committee



GENERAL INFORMATION

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

FRIDAY, SEPTEMBER 30

- 8:00 a.m. – 8:30 a.m. Continental Breakfast for the Board of Trustees
Lee Anderson Veterans Center
Board of Trustees Members Only
- 8:30 a.m. – 10:00 a.m. Board of Trustees Meeting
Lee Anderson Veterans Center
Board of Trustees Members Only
- 10:15 a.m. – 12:00 p.m. Boards of Regents Meetings
Winter Board – Amway
Midwest Board – 3rd Floor Conference Room
Southeast Board – Lower Level Conference Room
West Board – 4th Floor Conference Room
Northeast Board – Emerson Electric
- 12:00 p.m. – 12:45 p.m. Board Luncheon
J.D. Foster, Chief Economist
U.S. Chamber of Commerce
Hall of Flags
Board of Trustees, Boards of Regents
- 12:45 p.m. – 2:15 p.m. Educational Session
Justin Patton, Communications Skills Coach
Bodylitics
Hall of Flags
Board of Trustees, Boards of Regents
- 2:15 p.m. Formal Meeting Agenda Concludes



GENERAL INFORMATION

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

STAFF CONTACTS

Raymond P. Towle, IOM, CAE
Vice President, Institute for Organization
Management
Vice President, Political Affairs and Federation
Relations
U.S. Chamber of Commerce
202-463-5853
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sparish@uschamber.com

Carly Flick
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U.S. Chamber of Commerce Foundation
202-463-5399
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Karyn K. MacRae, IOM, CAE, CMP
Director, Institute for Organization
Management
U.S. Chamber of Commerce Foundation
202-463-5704
kmacrae@uschamber.com

Andrew Weller
Senior Coordinator, Marketing and
Communications, Institute for Organization
Management
U.S. Chamber of Commerce Foundation
202-463-5802
aweller@uschamber.com



BOARD OF TRUSTEES

2016 ROSTER

CHAIR

Robert E. Thomas, IOM, CAE, CMP
Senior Director of Operations
Michigan Chamber of Commerce
Executive Director
Michigan Chamber Foundation
600 South Walnut Street
Lansing, MI 48933
517-371-7639
bthomas@michamber.com
Term: 2015-2016

PAST CHAIR

Matt G. Pivarnik, IOM, CCE
President and CEO
Greater Topeka Chamber of Commerce & GO
Topeka
120 SE Sixth Avenue, Suite 110
Topeka, KS 66603
785-234-2644
mpivarnik@greatertopeka.org
Term: 2015-2016

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

Catherine S. Dority, IOM
Director of Marketing
Charleston Area Convention and Visitors
Bureau
423 King Street
Charleston, SC 29403
843-805-3090
cdority@explorecharleston.com
Term: 2011-2016

VICE CHAIR

Joseph B. Henning, IOM, CAE, ACE
President and CEO
Aurora Regional Chamber of Commerce
43 West Galena Boulevard
Aurora, IL 60506
630-256-3181
jhenning@aurorachamber.com
Term: 2015-2016

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

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

Teresa Eyet, IOM
Senior Director, Conference Programming and
Educational Development
American Health Care Association
1201 L Street, NW
Washington, DC 20005
202-898-2837
teyet@ahca.org
Term: Through 2016



BOARD OF TRUSTEES

2016 ROSTER

L. Dean Faile, IOM
President and CEO
Lancaster County Chamber of Commerce
PO Box 430
Lancaster, SC 29721
803-283-4105
deanfaile@lancasterchambersc.com
Term: 2014-2016

Mark L. Field, IOM, CCE
Senior Vice President of Membership
Knoxville Chamber of Commerce
17 Market Square #201
Knoxville, TN 37902
865-246-2607
mfield@knoxvillechamber.com
Term: Through 2016

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

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

Megan A. Lucas, IOM, CEcD
Chief Executive Officer and Chief Economic
Development Officer
Lynchburg Regional Business Alliance
828 Main Street, 12th Floor
Lynchburg, VA 24504
434-847-1447 ext. 314
MeganLucas@lynchburgregion.org
Term: 2014-2017

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

Timothy M. McKee, IOM
Chief Executive Officer
Olathe Chamber of Commerce
18001 West 106th Street, Suite 160
Olathe, KS 66061
913-764-1050
tmckee@olathe.org
Term: 2012-2016

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



BOARD OF TRUSTEES

2016 ROSTER

Corey Rosenbusch, IOM, CAE
President and CEO
Global Cold Chain Alliance
1500 King Street, Suite 201
Alexandria, VA 22314
703-373-4300 ext. 213
crosenbusch@gcca.org
Term: 2015-2016

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

Marnie L. Uhl, IOM, ACE
President and CEO
Prescott Valley Chamber of Commerce
7120 Pav Way, Suite 102
Prescott Valley, AZ 86314
928-772-8857
marnie@pvchamber.org
Term: 2012-2016

Tony Vedda, IOM, CCE
President and CEO
North Texas GLBT Chamber of Commerce
3824 Cedar Springs Road, Suite 429
Dallas, TX 75219
214-821-4528
tony.vedda@glbtchamber.org
Term: Through 2016

Chris E. Wallace, IOM, CCE
President
Texas Association of Business
1209 Nueces Street
Austin, TX 78701
512-477-1006
cwallace@txbiz.org
Term: 2011-2016

Scott Waller, IOM
Executive Vice President and COO
Mississippi Economic Council
PO Box 23276
Jackson, MS 39225
601-969-0022
swaller@mec.ms
Term: 2015-2016

BOARD OF TRUSTEES AGENDA



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

FALL 2016 MEETING

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

I. Welcome and Introductions

Robert E. Thomas, IOM, CAE, CMP
Chair, Institute for Organization Management
Senior Director of Operations, Michigan Chamber of Commerce
Executive Director, Michigan Chamber Foundation

II. Approval of Minutes

February 10, 2016 Webinar Meeting

III. Approval of Nominating Committee Reports

IV. Consent Agenda

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

V. Curriculum Committee Report

VI. Updates and Discussion

- a. Scholarships and Incentives Update
- b. Diversity Recruitment Update
- c. Open Forum: Community Trends
- d. Collaborative Discussion Follow-Up

VII. Chairman's Report

VIII. Looking Ahead

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

IX. Other Business

X. Adjournment

Next Meeting via Webinar: February 7, 2017 from 11:30 a.m. to 1:00 p.m. EST
Next In-Person Meeting: October 6, 2017, Washington, DC

BOARD OF TRUSTEES AGENDA



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

WINTER 2016 MINUTES

FEBRUARY 10, 2016
11:30 A.M.–1:00 P.M. EST
WEBINAR

In attendance: Robert E. Thomas, IOM, CAE, CMP; Kimberly Nastasi, IOM; Joseph B. Henning, IOM, CAE, ACE; Jeremy L. Arthur, IOM; Christin Berry, CAE; Mark L. Field, IOM, CCE; Kimberly Guida, IOM, CAE; DJ Johnson, IOM, CAE; Jack Lank, IOM; Megan A. Lucas, IOM, CEcD; Matt R. McCormick, IOM, CCE; Timothy M. McKee, IOM, CCE; Jodie A. Perry, IOM; Corey Rosenbusch, IOM, CAE; Marnie L. Uhl, IOM, ACE; Tony Vedda, IOM, CCE; Chris E. Wallace, IOM, CCE; Scott Waller, IOM; Raymond P. Towle, IOM, CAE; Karyn K. MacRae, IOM, CAE, CMP; Meghan M. Longenecker, IOM; Andrew Weller; Carly Turk

Not in attendance: Catherine S. Dority, IOM; Teresa Eytet, IOM; L. Dean Faile, IOM; Crystal Moore; Matt G. Pivarnik, IOM, CCE

I. Welcome and Introductions

Robert E. Thomas, IOM, CAE, CMP welcomed everyone to the call and introductions were made.

II. Approval of Minutes

The minutes from the October 9, 2015 meeting were unanimously approved.

III. Approval of Nominating Committee Report

The Board of Trustees, Curriculum Committee, Winter Board of Regents, and Midwest Board of Regents nominating committee reports were all approved.

BOARD OF TRUSTEES

NEW TRUSTEE

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

ROTATING OFF

Jack Lank, IOM
President and CEO
The United Regional Chamber of Commerce (MA)
Term: Through 2016 as *Chair of Winter Board of Regents*

CURRICULUM COMMITTEE

NEW MEMBER

Stephanie M. Parton, IOM, CAE
Director, Marketing Communications
Indiana CPA Society
Term: Through 2017 as *Vice Chair of Winter Board of Regents*

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

BOARD OF TRUSTEES AGENDA



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

WINTER 2016 MINUTES

ROTATING OFF COMMITTEE

Marla C. Akridge, IOM
Executive Director
Alleghany Highlands Economic Development Corporation (VA)
Term: 2012-2016

Blain Andera, IOM
Executive Director
Spirit Lake Chamber of Commerce (IA)
Term: Through 2016 as *Vice Chair of Winter Board of Regents*

WINTER BOARD OF REGENTS

Chair

Blain Andera, IOM
Executive Director
Spirit Lake Chamber of Commerce (IA)
Term: 2016-2017

Vice Chair

Stephanie M. Parton, IOM, CAE
Director, Marketing Communications
Indiana CPA Society
Term: 2016-2017

Past Chair

Jack Lank, IOM
President and CEO
The United Regional Chamber of Commerce (MA)
Term: 2016-2017

The following individuals are nominated:

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

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

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

Term Renewals (two-year term):

Rick Howe, IOM
Visitors Service Director
Jackson Hole Chamber of Commerce (WY)
Term: 2014-2018

Nick Kieffer, IOM, CP
Vice President, Business Development
Goshen Chamber of Commerce (IN)
Term: 2012-2018

William Lee, IOM
County Designee, Legislative Committee
Gallup-McKinley County Chamber of Commerce (NM)
Term: 2014-2018

Ruth Littlefield, IOM, CCE
Vice President, Membership Development and Relations
Tulsa Regional Chamber (OK)
Term: 2012-2018

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

Tracy Mosley, IOM
President and CEO
Choctaw Chamber of Commerce (OK)
Term: 2014-2018

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

BOARD OF TRUSTEES AGENDA



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

WINTER 2016 MINUTES

REMAINING ON BOARD, NO ACTION REQUIRED

Steven Baas, IOM
Vice President for Government Affairs
Metropolitan Milwaukee Association of Commerce
(WI)
Term: 2015-2017

Steve Halter, IOM
President
Greater Poplar Bluff Area Chamber of Commerce
(MO)
Term: 2015-2017

ROTATING OFF BOARD

Lisa Krueger, IOM, ACE
President and CEO
Lake Havasu Area Chamber of Commerce (AZ)
Term: 2010-2016

Kimberly Nastasi, IOM
Chief Executive Officer
Mississippi Gulf Coast Chamber of Commerce
Term: 2007-2016

MIDWEST BOARD OF REGENTS

The following individual is nominated:

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

IV. Program Updates

Staff provided brief overviews of various aspects of the program. Karyn K. MacRae, IOM, CAE, CMP spoke about goals and opportunities and gave recognition to the volunteers and staff.

a. Marketing (Andrew Weller)

- Staff is very happy with marketing efforts since the last Winter Board meeting; improved marketing on all different mediums and took advice offered last year.
- Two different screen cleaners (association and chamber specific) are in production and will be featured at the association luncheon in March.
- Moving forward, there is need to increase efforts to smaller chambers and associations and increase the number of demographics reached, per BOT suggestion.
- Banner advertisements displayed on ASAE's website include attendee testimonials, an overview of the program, and a list of the Institute summer sites, dates, and locations that all link back to institute.uschamber.com/register.
- ACCE's *Chamber Executive* magazine has been an important medium for Institute to advertise testimonials and upcoming registration dates. Multiple half-page and full-page ads have been placed in the magazine in the style of, "I AM AN IOM BECAUSE..."
- "Important dates and deadlines stuffer" was updated with the new 2016 summer sites and 2017 Winter dates, and was placed in the post-site thank you letters sent to Institute attendees.
- Institute planner is distributed to all Institute attendees at site registration and is also included in conference shipments all around the country. This planner contains a calendar that people use all throughout the year and is a "walking advertisement."

BOARD OF TRUSTEES AGENDA



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

WINTER 2016 MINUTES

- The new blue water bottles given to attendees with their planner during Winter registration were very well received. Moving forward, new pieces will be distributed on-site to keep marketing efforts fresh and vibrant.
- b. Fundraising (Karyn K. MacRae, IOM, CAE, CMP)
 - Update was delivered on behalf of Shelby A. Parish, IOM, CMP.
 - 2015 was the first year Institute had an official fundraising strategy, which proved to be an overall success.
 - The goal of \$36,000 was surpassed, with just over \$41,000 raised.
 - 81% of board members participated in fundraising efforts. Staff will continue to communicate fundraising expectations with board members moving forward.
 - #GivingTuesday and on-site efforts were two areas in which fundraising excelled.
 - 2016 goals include raising \$45,000 and increasing participation amongst alumni.
- c. Scholarships (Karyn K. MacRae, IOM, CAE, CMP)
 - Update was delivered on behalf of Shelby A. Parish, IOM, CMP.
 - Due to fundraising success in 2015, scholarships for 2016 look strong.
- d. Social media (Meghan M. Longenecker, IOM)
 - To aid board members in the promotion of Institute, Institute staff will send social media calendars to the Board of Trustees and to the Boards of Regents for the four summer sites. New to the social media calendar in 2016 will be the addition of LinkedIn posts.
 - The IOM Alumni Facebook Group will continue to remain active. The group sees sporadic activity throughout the year, and there are no cons to keeping the group alive.
 - Winter Institute's social media activity was lower this year than in 2015. One factor that could have contributed to this was the rainy weather. Attendees did not go outside as much and take pictures in the beautiful Arizona weather like they have in previous years.
 - Overall, Institute's social media outlets have seen significant growth since the 2015 Board of Trustees Winter Webinar.
- e. Winter geographic breakdown (Carly Turk)
 - The Winter geographic breakdown sheet shows that Institute saw 246 attendees from 35 states and the District of Columbia.
 - DC, Missouri, Oklahoma, and Virginia had the largest increases in attendees. Texas once again had the most attendees represented from one state.

BOARD OF TRUSTEES AGENDA



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

WINTER 2016 MINUTES

V. Boards of Regents' Reports

Each of the regent chairs shared their report. For the four summer sites, this included their plan of action to drive site attendance and meet their goals.

a. Winter Board of Regents report

Jack Lank, IOM delivered the Winter Board of Regents report and shared the success of 2016 Winter Institute. Recognition for the strong attendance numbers was given to the board for their continued outreach and communication with current attendees and prospects. Everyone worked together to overcome the logistical challenges faced on-site. Successes and highlights from the week included the silent auction and general fundraising, lunch roundtable discussions and professional consultations, and the Graduation/Big Bash event.

b. Midwest Board of Regents report

Vice Chair Jodie A. Perry, IOM delivered the Midwest Board of Regents report on behalf of Chair Teresa Eyt, IOM. Midwest is looking forward to June and is excited to follow in Winter's footsteps with strong attendance numbers. Two ways in which to assist with recruitment involve regents promoting to nonprofit organizations such as CVBs, charitable organizations, and historical societies, as well as regents fully utilizing their Board Scholarships. The Class Advisor slate is almost finalized and the group is working on ways to improve the opening Kickoff session.

c. Southeast Board of Regents report

Mark L. Field, IOM, CCE delivered the Southeast Board of Regents report. Southeast plans to utilize social media in their recruitment efforts. They are also placing special focus on association and diversity recruitment, in addition to utilizing their Board Scholarships to reach historically untapped organizations. All Class Advisors have been finalized and confirmed.

d. West Board of Regents report

Tony Vedda, IOM, CCE delivered the West Board of Regents report and shared how the board plans to improve diversity at the West site by seeking out diverse organizations within everyone's communities, as well as leveraging current relationships with ACCE and other state organizations. There is a new hotel this year, along with the on-campus housing option. The on-campus experience has improved the past few years with the addition of welcome bags and pre-site information. Scholarships and fundraising efforts continue to be a focus and source of pride for West.

e. Northeast Board of Regents report

Chris E. Wallace, IOM, CCE delivered the Northeast Board of Regents report. Strategic goals include enhanced marketing to help increase attendance, and regents were tasked with recruiting at least one first-year, preferably to the Villanova site. The on-site auction will return to its previous paper-bidding format and the fundraising goal has been increased. Regents have placed an emphasis on customer service, as well as on social media efforts.

BOARD OF TRUSTEES AGENDA



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

WINTER 2016 MINUTES

VI. Recruitment Efforts and Action Items

Robert E. Thomas, IOM, CAE, CMP led the discussion on how to create more program awareness amongst associations, diversity organizations, and millennial professionals. Regent chairs were thanked for focusing on diversity. Highlights from the discussion are included below.

a. Associations

- Consider offering scholarships to associations in volunteers' home state.
- Focus on CAE recruitment and testimonials, particularly around the time that CAE test results are released (late January/late June).
- Utilize board member connections to state associations.
- Leverage relationship with Melissa Walling for connection into the Association Forum of Chicagoland.
- Use word-of-mouth promotion to recruit for the association open house in DC.

b. Diversity organizations

- Before attempting to recruit, be sure to inform diverse organizations about what Institute is and why it would be beneficial.
- Use marketing to state conferences as an opportunity to focus on diverse organizations within board members' states.
- It was noted that many organizations are volunteer driven and not run by staff.

c. Millennial professionals

- Connect with state societies to see what millennial-focused programs they offer.
- Look to millennial leadership in Regent/Class Advisor selection.
- Reach out to chambers in communities with colleges/universities to help inform recent graduates about the study of nonprofit management. Touch base with ACCE's University Communities Council.

VII. Chairman's Report

Robert E. Thomas, IOM, CAE, CMP delivered his chairman's report, which included the points below.

- The work done by the Curriculum Committee was recognized and it was shared that most of the curriculum changes made at the 2015 Fall Board Meeting were incorporated at the 2016 Winter site. The last few changes will go into effect starting at the 2016 Midwest site with the addition of C420 and elimination of C440.
- Jack Lank and the rest of the Winter Board of Regents were congratulated.
- The success of eliminating slideshow presentations during graduation was reiterated.

BOARD OF TRUSTEES AGENDA



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

WINTER 2016 MINUTES

- 2016 registration goals and excitement for the summer were shared.
 - Overall: 332 first-years/940 overall
 - Winter:
 - Goal: 76 first-years/231 overall
 - Actual: 86 first-years/246 overall
 - Midwest: 57 first-years/158 overall
 - Southeast: 99 first-years/262 overall
 - West: 36 first-years/115 overall
 - Northeast: 64 first-years/174 overall
- Feedback on curriculum, logistics, etc. was encouraged.

VIII. Other Business

No other business was discussed.

IX. Adjournment

Excitement for 2016 was expressed and everyone was encouraged to continue actively promoting the program and utilize their Board Scholarships.

There being no other business the webinar was adjourned.

Next In-Person Meeting: September 30, 2016, Washington, DC



NOMINATIONS

2017 BOARD OF TRUSTEES

Chair

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

Chair Elect

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

Vice Chair

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

Past Chair

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

Board of Regents Chairs (one-year term):

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

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



NOMINATIONS

2017 BOARD OF TRUSTEES

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

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

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

Curriculum Committee Chair:

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

At-large position (one-year term):

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

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

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



NOMINATIONS

2017 BOARD OF TRUSTEES

At-large position (two-year term):

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

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

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

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

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

REMAINING ON BOARD, NO ACTION REQUIRED

Standing:

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

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



NOMINATIONS

2017 BOARD OF TRUSTEES

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

At-large (two-year term):

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

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

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

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

ROTATING OFF BOARD

Board of Regents Chairs (one-year term):

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



NOMINATIONS

2017 BOARD OF TRUSTEES

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

At-large (one-year term):

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

Chair Elect:

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

Past Chair:

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



NOMINATIONS

2017 CURRICULUM COMMITTEE

Chair

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

Vice Chair

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

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

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

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

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

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

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



NOMINATIONS

2017 CURRICULUM COMMITTEE

At-large (two-year term):

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

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

Term Renewals (two-year term):

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

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

Faculty Member (two-year term):

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

REMAINING ON COMMITTEE, NO ACTION REQUIRED

Standing:

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



NOMINATIONS

2017 CURRICULUM COMMITTEE

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

At-large (two-year term):

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

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

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

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

Faculty Member (two-year term):

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



NOMINATIONS

2017 CURRICULUM COMMITTEE

ROTATING OFF COMMITTEE

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

Blain Andera, IOM

Executive Director

Spirit Lake Chamber of Commerce

Spirit Lake, IA

Term: 2015-2016 as *Vice Chair of Winter Board of Regents (confirmed February 10, 2016)*

Steve Clark, IOM, J.D., CFE

President and CEO

Fayetteville Chamber of Commerce

Fayetteville, AR

Term: 2015-2016 as *Vice Chair of Northeast Board of Regents*

Kimberly Dahlsten, IOM

Vice President, Director of Membership

Manhattan Area Chamber of Commerce

Manhattan, KS

Term: 2015-2016 as *Vice Chair of Southeast Board of Regents*

Kelle Marsalis, IOM, CCE

Vice President, Strategic Initiatives

Dallas Regional Chamber

Dallas, TX

Term: 2015-2016 as *Vice Chair of West Board of Regents*

Jodie A. Perry, IOM

President

Richland Area Chamber of Commerce

Mansfield, OH

Term: 2015-2016 as *Vice Chair of Midwest Board of Regents*

At-large (two-year term):

Ali Crain, IOM, CCE, ACE

Executive Director

Kentucky Chamber of Commerce Executives

Frankfort, KY

Term: 2013-2017

Matt G. Pivarnik, IOM, CCE

President and CEO

Greater Topeka Chamber of Commerce and GO Topeka

Topeka, KS

Term: 2012-2016



NOMINATIONS

2017 MIDWEST BOARD OF REGENTS

Chair

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

Vice Chair

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

Past Chair

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

The following individuals are nominated:

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

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

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



NOMINATIONS

2017 MIDWEST BOARD OF REGENTS

Term Renewals (two-year term):

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

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

REMAINING ON BOARD, NO ACTION REQUIRED

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

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

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

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

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



NOMINATIONS

2017 MIDWEST BOARD OF REGENTS

ROTATING OFF BOARD

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

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

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

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



NOMINATIONS

2017 SOUTHEAST BOARD OF REGENTS

Chair

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

Vice Chair

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

Past Chair

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

The following individuals are nominated:

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

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

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



NOMINATIONS

2017 SOUTHEAST BOARD OF REGENTS

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

Term Renewals (two-year term):

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

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

REMAINING ON BOARD, NO ACTION REQUIRED

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

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

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

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



NOMINATIONS

2017 SOUTHEAST BOARD OF REGENTS

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

ROTATING OFF BOARD

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

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



NOMINATIONS

2017 WEST BOARD OF REGENTS

Chair

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

Vice Chair

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

Past Chair

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

The following individuals are nominated:

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

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

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



NOMINATIONS

2017 WEST BOARD OF REGENTS

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

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

REMAINING ON BOARD, NO ACTION REQUIRED

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

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

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

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

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



NOMINATIONS

2017 WEST BOARD OF REGENTS

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

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

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

ROTATING OFF BOARD

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

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



NOMINATIONS

2017 NORTHEAST BOARD OF REGENTS

Chair

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

Vice Chair

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

Past Chair

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

The following individuals are nominated:

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

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

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



NOMINATIONS

2017 NORTHEAST BOARD OF REGENTS

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

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

Term Renewals (two-year term):

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

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

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

REMAINING ON BOARD, NO ACTION REQUIRED

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

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



NOMINATIONS

2017 NORTHEAST BOARD OF REGENTS

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

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

ROTATING OFF BOARD

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

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

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

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



CONSENT AGENDA

WINTER CHAIRMAN'S REPORT, FALL 2016

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

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

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

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

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

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

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

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



CONSENT AGENDA

MIDWEST CHAIRMAN'S REPORT, FALL 2016

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

RECRUITMENT

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

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

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

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

RETENTION

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

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

RELATIONSHIPS

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

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



CONSENT AGENDA

MIDWEST CHAIRMAN'S REPORT, FALL 2016

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

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

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

Final Words

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

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

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

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

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



CONSENT AGENDA

SOUTHEAST CHAIRMAN'S REPORT, FALL 2016

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

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

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

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

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

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

Other strategies for 2017 Southeast Institute overall success include:

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



CONSENT AGENDA

SOUTHEAST CHAIRMAN'S REPORT, FALL 2016

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

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

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

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



CONSENT AGENDA

WEST CHAIRMAN'S REPORT, FALL 2016

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

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

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

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

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

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

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

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



CONSENT AGENDA

WEST CHAIRMAN'S REPORT, FALL 2016

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

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



CONSENT AGENDA

NORTHEAST CHAIRMAN'S REPORT, FALL 2016

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

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

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

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

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

I offer much gratitude to the Northeast team.

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



DEMOGRAPHICS

REGISTRATION PROJECTIONS AND GOALS

Assumptions (Based on average percentage change since 2011):

- Retention Rates of 80%, 88%, and 93%
- First-Year Projected Attendee Rates:
Winter: 9.04% Midwest: 10.79% Southeast: 8.89% West: 2.45% Northeast: 2.71%

WINTER	2016 Final	2017 Projections	2018 Projections	2019 Projections
Class Section				
1-1	44	32	34	37
1-2	42	31	34	37
1-3		31	34	37
1st yr Total	86	94	102	111
2-1	30	34	37	41
2-2	30	34	37	40
2nd yr Total	60	69	75	82
3-1	24	27	30	33
3-2	22	26	30	32
3rd yr Total	46	53	61	67
4-1	25	22	25	28
4-2	29	21	24	28
4th yr Total	54	43	49	56
Winter Total	246	258	288	317

MIDWEST	2016 Final	2017 Projections	2018 Projections	2019 Projections
Class Section				
1-1	23	25	28	31
1-2	22	25	27	30
1st yr Total	45	50	55	61
2-1	40	36	40	44
2nd yr Total	40	36	40	44
3-1	29	35	32	35
3rd yr Total	29	35	32	35
4-1	26	27	33	30
4th yr Total	26	27	33	30
MW Total	140	148	160	170

SOUTHEAST	2016 Final	2017 Projections	2018 Projections	2019 Projections
Class Section				
1-1	23	26	29	31
1-2	22	26	28	31
1-3	27	26	28	31
1st yr Total	72	78	85	93
2-1	39	29	32	35
2-2	35	29	31	34
2nd yr Total	74	58	63	69
3-1	24	34	26	28
3-2	26	31	25	28
3rd yr Total	50	65	51	56
4-1	29	22	31	24
4-2	19	24	30	23
4th yr Total	48	46	61	47
SE Total	244	248	260	264

WEST	2016 Final	2017 Projections	2018 Projections	2019 Projections
Class Section				
1-1	30	31	31	32
1st yr Total	30	31	31	32
2-1	34	24	25	25
2nd yr Total	34	24	25	25
3-1	32	30	21	22
3rd yr Total	32	30	21	22
4-1	21	30	28	20
4th yr Total	21	30	28	20
West Total	117	114	105	99

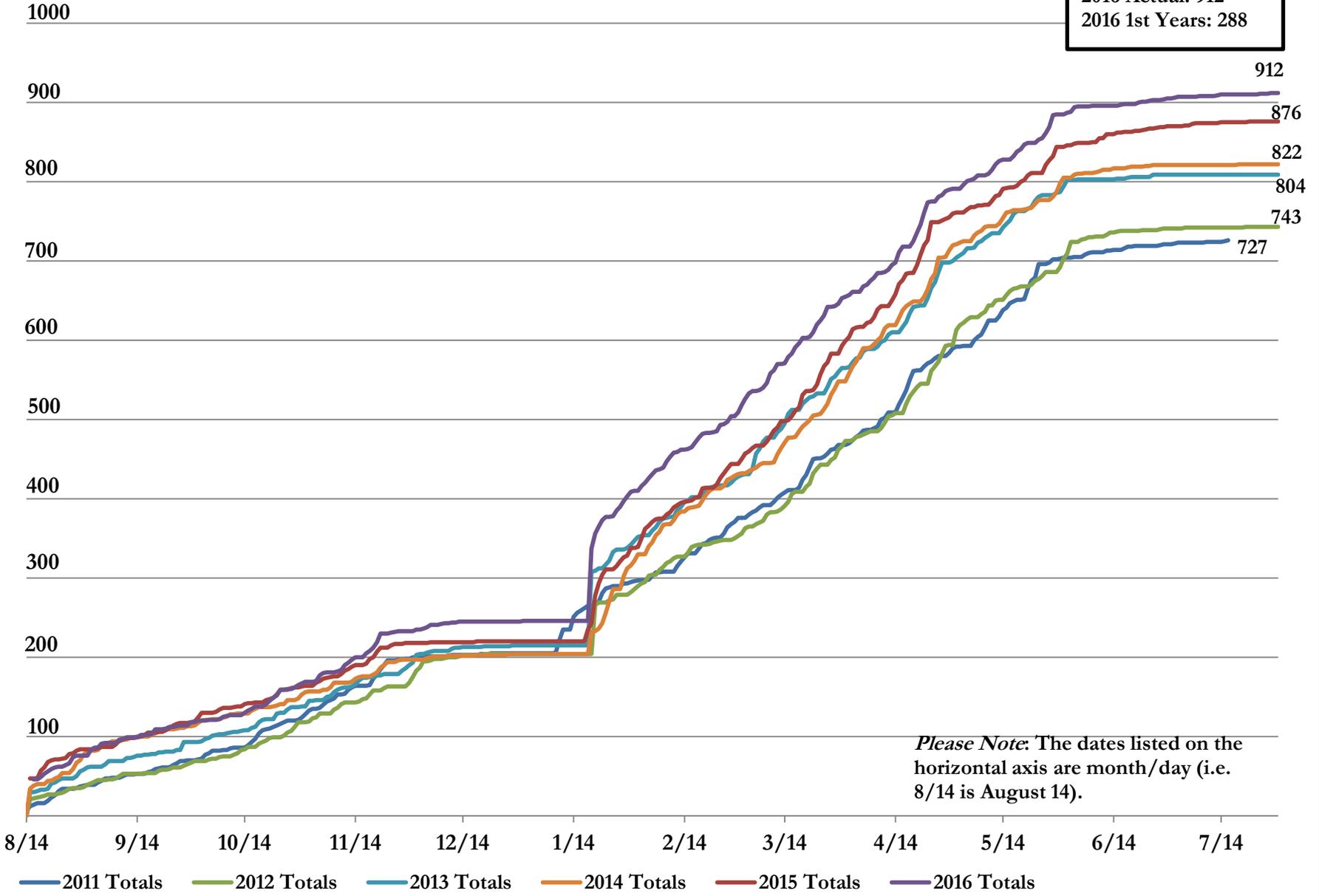
NORTHEAST	2016 Final	2017 Projections	2018 Projections	2019 Projections
Class Section				
1-1	30	28	29	30
1-2	25	28	29	30
1st yr Total	55	56	58	60
2-1	49	22	23	24
2-2		22	22	23
2nd yr Total	49	44	45	47
3-1	29	43	39	40
3rd yr Total	29	43	39	40
4-1	32	27	40	36
4th yr Total	32	27	40	36
NE Total	165	171	183	182

	Final number	2017 Projection	2018 Projection	2019 Projection
Enrollment	912	940	995	1033

2017 Goals
First-Year Goal: 309
Enrollment Goal: 940

2011-2016 Institute Registrations

2016 Goal: 940
 2016 Actual: 912
 2016 1st Years: 288





DEMOGRAPHICS

2016 DEMOGRAPHICS BY SITE

Class Level	Winter 2016	Midwest 2016	Southeast 2016	West 2016	Northeast 2016
	1st year	34.96%	32.14%	29.51%	25.64%
2nd year	24.39%	28.57%	30.33%	29.06%	29.70%
3rd year	18.70%	20.71%	20.49%	27.35%	17.58%
4th year	21.95%	18.57%	19.75%	17.95%	19.39%

Employer	Winter 2016	Midwest 2016	Southeast 2016	West 2016	Northeast 2016
	Association	17.89%	27.14%	9.02%	19.66%
Chamber	71.14%	65.00%	88.52%	75.36%	52.12%
Other	10.98%	7.86%	2.46%	5.98%	6.67%

Age	Winter 2016	Midwest 2016	Southeast 2016	West 2016	Northeast 2016
	21 – 30	13.41%	18.57%	19.67%	15.38%
31 – 40	36.59%	33.57%	36.07%	32.48%	31.52%
41 – 50	27.24%	27.14%	23.77%	33.33%	32.12%
51 +	22.76%	20.71%	20.49%	18.80%	18.18%

Gender	Winter 2016	Midwest 2016	Southeast 2016	West 2016	Northeast 2016
	Male	28.46%	35.00%	19.67%	29.06%
Female	71.54%	65.00%	80.33%	70.94%	72.12%

Ethnicity*	Winter 2016	Midwest 2016	Southeast 2016	West 2016	Northeast 2016
	*Question not required (answers may not total 100%)				
Caucasian	89.17%	90.71%	93.70%	78.95%	87.34%
Other Ethnicity	10.83%	5.71%	6.30%	21.05%	12.66%

Years of Experience in Association/Chamber Field	Winter 2016	Midwest 2016	Southeast 2016	West 2016	Northeast 2016
	Less than 2 years	8.13%	10.00%	13.52%	7.69%
2 to 5 years	29.67%	32.14%	36.07%	35.04%	23.64%
6 to 10 years	33.74%	22.14%	28.69%	26.50%	6.67%
More than 10 years	28.46%	35.71%	21.72%	30.77%	40.00%



DEMOGRAPHICS

2016 DEMOGRAPHICS BY SITE

How Did You Learn About Institute?*					
*Attendees had opportunity to choose more than one option	Winter 2016	Midwest 2016	Southeast 2016	West 2016	Northeast 2016
Employer	61.79%	54.29%	69.67%	61.54%	54.55%
Colleague	26.42%	32.14%	18.44%	23.93%	30.91%
State Conference	7.72%	11.43%	5.33%	6.84%	3.64%
Direct Mail	0.00%	0.71%	0.41%	0.00%	0.61%
Email	0.81%	0.67%	0.82%	0.00%	1.82%
Website	1.63%	0.71%	1.64%	3.42%	2.42%
Other	1.63%	0.00%	3.69%	4.27%	6.06%

Organization's Budget Size (excluding Public Funds)					
	Winter 2016	Midwest 2016	Southeast 2016	West 2016	Northeast 2016
Less than \$100,000	4.88%	3.57%	3.28%	3.42%	4.85%
\$100,001 - \$250,000	15.85%	12.14%	18.03%	7.69%	13.94%
\$250,001 - \$500,000	21.14%	22.14%	22.95%	17.09%	14.55%
\$500,001 - \$1,000,000	16.67%	16.43%	22.13%	22.22%	14.55%
\$1,000,001 - \$3,000,000	16.67%	19.29%	13.11%	27.35%	17.58%
\$3,000,001 - \$5,000,000	7.32%	5.71%	9.43%	10.26%	7.27%
\$5,000,001 - \$10,000,000	5.69%	8.57%	6.97%	4.27%	11.52%
Greater than \$10,000,001	11.79%	12.14%	4.10%	7.69%	15.76%

Organization's Staff Size					
	Winter 2016	Midwest 2016	Southeast 2016	West 2016	Northeast 2016
Less than 3	18.70%	10.00%	18.44%	9.40%	13.94%
3 to 10	45.93%	50.00%	50.41%	45.30%	41.21%
11 to 25	15.04%	17.14%	14.75%	31.62%	15.15%
26 to 50	6.91%	10.00%	10.66%	6.84%	8.48%
51 to 100	7.72%	7.86%	2.87%	4.27%	11.52%
More than 100	5.69%	5.00%	2.87%	1.60%	9.70%

Level of Responsibility					
	Winter 2016	Midwest 2016	Southeast 2016	West 2016	Northeast 2016
CEO / Executive Director	37.80%	29.29%	34.84%	29.06%	35.76%
Senior Executive / Department Director	32.52%	30.00%	33.61%	42.74%	34.55%
Manager	19.11%	29.29%	19.26%	19.66%	13.21%
Coordinator / Assistant	10.57%	11.43%	12.30%	8.55%	8.48%



DEMOGRAPHICS

2016 DEMOGRAPHICS BY SITE

Primary Job Responsibility					
	Winter 2016	Midwest 2016	Southeast 2016	West 2016	Northeast 2016
Membership	14.63%	19.29%	18.85%	13.68%	13.94%
General Management	46.75%	35.00%	38.93%	34.19%	47.27%
Marketing	9.76%	12.14%	11.48%	16.24%	11.52%
Finance	3.66%	5.00%	4.10%	5.13%	3.03%
Economic Development (asked in registration for Winter 2016)	5.28%	4.29%	4.10%	3.42%	1.82%
Government Relations (asked in registration for Summer 2016)	————	7.14%	2.87%	4.27%	10.30%
Other	19.92%	17.14%	19.67%	23.08%	12.12%



YEAR IN REVIEW

MARKETING UPDATE

In 2016, Institute's marketing efforts were advanced through the hard work and collaboration of the volunteers and the Institute staff. Below is an overview of our marketing accomplishments for your review. Our main aim was to create new messaging and outlets for promotion of the organization in addition to sustaining successful practices from past years.

Advertisements:

- *Chamber Executive* magazine has been an important medium for us to advertise past Institute testimonials and upcoming registration dates. Multiple half-page and full-page ads have been placed in the magazine. The focus of the ads was Institute summer registration, scholarship deadlines and other testimonials and photos highlighting the Institute program.
- Our "scholarship stuffer" postcard was updated with the new 2016 sites and dates, and this postcard was placed in the post-site thank you letters sent to Institute attendees. It was also printed and mailed to state conferences where we have a representative presence.
- The Institute planner is our largest and most prominent advertisement. It is distributed to all Institute attendees at site registration and is also included in conference shipments all around the country, as well as regional Chamber offices. This planner contains a calendar that people use all throughout the year and is a "walking advertisement."
- A web banner ad with the summer registration dates and an Institute alumni testimonial was featured on the ASAE website for three months before summer registration. This prominent placement was guaranteed to get us thousands of impressions.
- Three video testimonials that give a short, but quick in-depth look into what the benefits of Institute are have been hugely popular on social media and we plan on continuing these efforts by creating more videos in the coming months.

Promotional Materials:

- Continued from last year, Institute sent blue tablecloths with our logo and hashtag to different conferences, and they were also utilized by staff at larger conferences such as ACCE and MAKO. These are bright, eye-catching pieces that are easy to transport and send, and they also market our social media presence.
- The fruit-infusion water bottles given to attendees with their planner during registration were very well received. We have done water bottles in past years, but attendees always look forward to them and they help to cut costs on-site.
- New last year, Institute screen cleaners, featuring a testimonial from Institute board members and alumni, have been a huge hit at state and national conferences. They are a unique item and printing them in full-color makes them an attractive collateral piece.
- The Institute pens that are distributed on-site are a high quality pen with our logo. This pen writes very well and is used by attendees post-site. It is also included in state conference shipments.



YEAR IN REVIEW

STATE PARTNERSHIP UPDATE

PAY IT FORWARD SCHOLARSHIP PROGRAM

- On two occasions in 2016, Institute reached out to 123 state executive societies (chamber of commerce executive societies, association executive societies, economic development councils, and convention and visitor bureaus). The first time was to encourage Winter Institute participation and the second was in regards to summer registration.
- Of the 123 organizations who were contacted, 50 participated by sharing information about the Institute program with their members.
- In total, 35 first-year participants attended Institute using a PIF scholarship; 32 chamber of commerce professionals and three association professionals.
- Once again in 2016, Institute reached out to “nontraditional” partners such as state CVBs and EDCs. However, none chose to participate this year.

MARKETING INSTITUTE TO STATE PROGRAMS THROUGH GIVEAWAYS

- Institute sent marketing materials, including branded electronic screen cleaners, planners, and ad slicks, to 27 association executive societies, chamber of commerce executive societies, and other professional nonprofit societies since this time last year.

PARTICIPATION AT STATE, ANNUAL, AND REGIONAL CONFERENCES

- Institute will have had a presence at six conferences in 2016: Association of Chamber of Commerce Executives (ACCE), Florida Association of Chamber Professionals (FACP), Illinois Society of Association Executives (ISAE), Missouri, Arkansas, Kansas, Oklahoma Conference (MAKO), Texas Chamber of Commerce Executives (TCCE), and Western Association of Chamber Executives (W.A.C.E.).
- Institute sees our increased presence at annual conferences valuable for the dual purposes of recruiting new attendees and reminding alumni of the impact Institute had on their careers.

W.A.C.E. PARTNERSHIP

- Institute continues to partner with the Western Association of Chamber Executives.
- Graduates of the Academy program are eligible to attend Institute as third-year attendees, bypassing their first two years of the program.
- Seven attendees began their Institute experience as third-years through the W.A.C.E./Institute partnership.



YEAR IN REVIEW

STATE PARTNERSHIP UPDATE

PAY IT FORWARD 2016 - CHAMBER OF COMMERCE EXECUTIVE SOCIETIES

State	Organization	2013	2014	2015	2016	2016 Winter	2016 MW	2016 SE	2016 West	2016 NE
Alabama	Chamber of Commerce Association of Alabama	3	2	2	0					
Alaska	Alaska State Chamber of Commerce	-	-	0	0					
Arizona	Arizona Chamber Executives	1	2	1	2	2				
Arkansas	Arkansas Chamber of Commerce Executives	1	4	0	0					
California	California Chamber of Commerce- W.A.C.E.	0	0	0	0					
Carolinas	Carolinas Association of Chamber of Commerce Executives	2	1	2	2			2		
Colorado	Colorado Chamber of Commerce Executives	1	2	1	0					
Connecticut	Connecticut Business and Industry Association	0	-	-	-					
Florida	Florida Association of Chamber Professionals	0	1	3	3			3		
Georgia	Georgia Association of Chamber of Commerce Executives	2	1	1	2			2		
Idaho	Idaho Chamber Alliance	-	-	-	-					
Illinois	Illinois Association of Chamber of Commerce Executives	1	1	0	2		1			1
Illinois	Illinois Council of Convention and Visitor Bureaus	-	1	1	-					
Indiana	Indiana Chamber Executives Association	2	2	2	3	2				1
Iowa	Iowa Chamber of Commerce Executives	0	0	0	2		2			
Kansas	Kansas Chamber of Commerce Executives	0	2	2	1				1	
Kentucky	Kentucky Chamber of Commerce Executives	2	2	0	1			1		
Kentucky	Kentucky Association of Economic Development	-	0	-	-					
Louisiana	Louisiana Association of Chamber of Commerce Executives	0	0	0	0					
Maine	Maine Chamber of Commerce Executives	-	1	0	-					
Maryland	Maryland Association of Chamber of Commerce Executives	2	2	0	2					2
Massachusetts	Massachusetts Association of Chamber of Commerce Executives	2	1	1	1					1
Michigan	Michigan Association of Chamber Professionals	2	2	3	3	1	1	1		
Mid-America	Mid-America Chamber of Commerce Executives	-	-	0	-					
Minnesota	Minnesota Chamber of Commerce Executives	0	-	0	0					
Mississippi	Mississippi Economic Development Council	2	2	1	1			1		
Missouri	Chamber of Commerce Executives of Missouri	1	2	1	0					
Montana	Montana Chamber of Commerce Executives	0	0	0	0					
Nebraska	Nebraska Chamber of Commerce Executives	-	-	-	-					
New England	New England Association of Chamber of Commerce Executives	1	0	0	0					
New Jersey	New Jersey Area Chamber of Commerce Executives	-	-	-	-					
New Mexico	New Mexico Chamber Executives	0	0	-	-					
New York	Business Council of New York State, Inc.	-	2	-	-					
North Dakota	North Dakota Chamber Executives	0	0	-	-					
Ohio	Chamber of Commerce Executives of Ohio	0	0	0	0					
Oklahoma	The State Chamber of Oklahoma	2	1	2	1	1				
Ontario	Ontario Chamber of Commerce Executives	-	0	-	-					
Oregon	Oregon State Chamber of Commerce	-	0	0	0					
Pennsylvania	Pennsylvania Association of Chamber Professionals	1	3	3	2					2
South Carolina	South Carolina Chamber of Commerce	2	1	0	0					
South Dakota	South Dakota Chamber and Economic Development Council	1	1	1	0					
Tennessee	Tennessee Chamber of Commerce Executives	2	3	3	2	1		1		
Texas	Texas Chamber of Commerce Executives	1	2	0	0					
Texas	North Texas Chamber of Commerce Executives	-	0	0	1				1	
Utah	The Utah State Chamber of Commerce	1	-	0	-					
Vermont	Vermont Association of Chamber of Commerce Executives	-	0	-	-					
Virginia	Virginia Association of Chamber of Commerce Executives	1	0	0	0					
Washington	Washington Chamber Executives	-	-	-	-					
West Virginia	West Virginia Chamber of Commerce	-	-	-	-					
Wisconsin	Wisconsin Chamber of Commerce Executives	0	0	0	-					
Wyoming	Wyoming Chamber of Commerce Executives	0	0	4	1				1	
Total		36	44	34	32	7	4	11	3	7

DASHES INDICATE THAT ORGANIZATION CHOSE NOT TO PARTICIPATE
NUMBERS INDICATE PARTICIPATION IN PIF PROGRAM AND NUMBER OF ATTENDEES SENT



YEAR IN REVIEW

STATE PARTNERSHIP UPDATE

PAY IT FORWARD 2016 - ASSOCIATION EXECUTIVE SOCIETIES

State	Organization	2013	2014	2015	2016	2016 Winter	2016 MW	2016 SE	2016 West	2016 NE
Alabama	Alabama Council of Association Executives	-	-	-	0					
Arizona	Arizona Society of Association Executives	-	-	-	-					
Arkansas	Arkansas Society of Association Executives	-	-	-	-					
California	California Society of Association Executives	1	1	0	0					
Colorado	Colorado Society of Association Executives	-	0	0	-					
Connecticut	Connecticut Society of Association Executives	-	-	-	-					
Florida	Florida Society of Association Executives	0	0	0	0					
Florida	Tallahassee Society of Association Executives	-	0	0	-					
Georgia	Georgia Society of Association Executives	0	0	0	0					
Idaho	Idaho Society of Association Executives	-	0	-	-					
Illinois	Illinois Society of Association Executives	1	2	0	1		1			
Illinois	Association Forum of Chicagoland	0	-	-	-					
Indiana	Indiana Society of Association Executives	0	0	0	0					
Iowa	Iowa Society of Association Executives	-	-	-	0					
Kansas	Kansas Society of Association Executives	-	-	-	-					
Kentucky	Kentucky Society of Association Executives	-	-	-	-					
Louisiana	Louisiana Society of Association Executives	0	-	-	-					
Maine	Maine Society of Association Executives	0	-	0	0					
Maryland	Maryland Society of Association Executives	0	-	-	-					
Michigan	Michigan Society of Association Executives	0	1	1	1		1			
Mississippi	Mississippi Society of Association Executives	-	-	-	-					
Missouri	Missouri Society of Association Executives	-	-	-	-					
Montana	Montana Society of Association Executives	-	-	-	-					
Delaware; New Jersey	Mid-Atlantic Society of Association Executives	-	-	0	-					
New Mexico	New Mexico Society of Association Executives	-	-	-	-					
New York	New York Society of Association Executives	-	-	-	-					
North Carolina	Association Executives of North Carolina	-	-	0	-					
Ohio	Ohio Society of Association Executives	1	0	0	0					
Oklahoma	Oklahoma Society of Association Executives	-	0	1	1	1				
Oregon	Oregon Society of Association Executives	-	-	-	-					
Pennsylvania	Pennsylvania Society of Association Executives	-	-	-	-					
South Carolina	South Carolina Society of Association Executives	1	-	-	-					
Tennessee	Tennessee Society of Association Executives	-	-	-	0					
Texas	Texas Society of Association Executives	-	-	-	-					
Texas	Dallas/Fort Worth Association Executives	-	0	0	0					
Utah	Utah Society of Association Executives	-	-	-	-					
Virginia	Virginia Society of Association Executives	0	-	-	0					
Washington	Washington Society of Association Executives	-	0	-	-					
West Virginia	West Virginia Society of Association Executives	-	-	-	-					
Wisconsin	Wisconsin Society of Association Executives	2	3	0	0					
Wyoming	Wyoming Society of Association Executives	0	-	0	-					
	Association Societies Alliance	0	1	-	-					
	Midwest Society of Association Executives	0	-	-	0					
	New England Society of Association Executives	-	-	-	-					
Total		6	8	2	3	1	2	0	0	0

DASHES INDICATE THAT ORGANIZATION CHOSE NOT TO PARTICIPATE
NUMBERS INDICATE PARTICIPATION IN PIF PROGRAM AND NUMBER OF ATTENDEES SENT



YEAR IN REVIEW

SCHOLARSHIP UPDATE

2016 Scholarship Statistics	Winter	Midwest	Southeast	West	Northeast	Total
Total scholarship applicants	62	33	38	32	32	197
Regent scholarships awarded	19	27	23	27	13	109
National scholarships awarded	6	6	6	5	3	26
Pay It Forward scholarships awarded	8	5	11	3	7	34
Faculty scholarships awarded	5	2	11	3	1	22
Alumni scholarships awarded	4					4
Board scholarships awarded	7	4	6	4	5	26
Total scholarships awarded	49	44	57	42	29	221

INCENTIVE PROGRAMS

- Friends and Family Enrollment Incentive
 - 47 individuals (14 first-years and 33 second- through fourth-years) attended Institute using the Friends and Family incentive from 30 unique organizations.
- Group Rate
 - 120 attendees registered for Institute using the group rate from 92 different organizations. In 2015, 98 organizations sent multiple attendees; this high rate of organizations sending multiple attendees is a positive trend for registration.

SCHOLARSHIPS

- Board Scholarship
 - In 2016, Institute awarded one \$500 scholarship per Board Member (Trustees and Regents) to award to a first-year Institute as a marketing tool.
 - 26 Board Members were able to successfully award a scholarship.

Awarded by:	Winter	Midwest	Southeast	West	Northeast
Board of Trustees	1	1	1	1	
Winter	6				
Midwest		2			
Southeast			4		2
West		1		3	
Northeast			1		3

- Alumni Scholarship
 - Institute discontinued the alumni scholarship after 2016 Winter.



YEAR IN REVIEW

SCHOLARSHIP UPDATE

- Faculty Scholarship Program
 - Institute continued the faculty scholarship incentive, offering all Institute faculty two \$500 first-year scholarships to award for each of the sites where they are invited to teach.
 - 22 first-year participants attended Institute using a faculty scholarship.

Name	Winter	Midwest	Southeast	West	Northeast
David Aaker	1			1	
Randall Chase			1		
Bryan Daniels			1		
Chuck Ewart			1		
Moore Hallmark			1		
Bob Harris			1		
Frank Kenny			2		
Megan Lucas	1				
Matt McCormick		1		1	
Pat McGaughey	2	1	3		
Robert Medler	1				
Annette Medlin			1	1	
Kyle Sexton					1



YEAR IN REVIEW

FUNDRAISING UPDATE

- 2016 Fundraising goal is \$45,000.
- Year to date, Institute has raised just over \$37,000 for the 2017 scholarship season.
- Institute participated in #GivingTuesday for the second time and surpassed goal, raising \$2,170.

2015	Winter	Midwest	Southeast	West	Northeast	Total
Funds remaining from previous year's scholarship allocation	\$1,412.00	\$895.00	\$0.00	\$0.00	\$960.00	\$3,267.00
Silent auction	\$5,727.00	\$3,973.00	\$7,666.00	\$8,600.00	\$4,723.00	\$30,689.00
Pre-scholarship deadline online donations	\$75.00	\$100.00	\$200.00	\$25.00	\$50.00	\$450.00
Post-scholarship deadline online donations	NA	\$996.00	\$0.00	\$0.00	\$200.00	\$1,196.00
Additional on-site fundraising	\$505.00	\$0.00	\$0.00	\$0.00	\$0.00	\$505.00
Annual appeal (mailing)	NA	NA	NA	NA	NA	NA
Bi-annual solicitation	NA	NA	NA	NA	NA	NA
#GivingTuesday	NA	\$208.00	\$153.00	\$138.00	\$8.00	\$507.00
Online store	NA	NA	NA	NA	NA	NA
Total to allocate to 2015 sites:	\$7,719.00	\$6,172.00	\$8,019.00	\$8,763.00	\$5,941.00	\$36,614.00

2016	Winter	Midwest	Southeast	West	Northeast	Total
Funds remaining from previous year's scholarship allocation	\$500.00	\$100.00	\$0.00	\$1,177.00	\$0.00	\$1,777.00
Silent auction	\$6,365.00	\$3,930.00	\$6,479.00	\$10,370.00	\$3,906.00	\$31,050.00
Pre-scholarship deadline online donations	\$125.00	\$0.00	\$0.00	\$0.00	\$0.00	\$125.00
Post-scholarship deadline online donations	\$50.00	\$0.00	\$0.00	\$50.00	\$150.00	\$250.00
Additional on-site fundraising	\$1,281.00	\$2,700.00	\$1,200.00	\$0.00	\$812.00	\$5,993.00
Annual appeal (mailing)	\$270.00	\$170.00	\$270.00	\$220.00	\$420.00	\$1,350.00
Bi-annual solicitation	\$2.00	\$197.00	\$2.00	\$102.00	\$107.00	\$410.00
#GivingTuesday	\$53.00	\$452.00	\$312.00	\$737.00	\$287.00	\$1,841.00
Online store	\$96.61	\$188.97	\$188.97	\$188.97	\$188.97	\$852.49
Total to allocate to 2016 sites:	\$8,742.61	\$7,737.97	\$8,451.97	\$12,844.97	\$5,870.97	\$43,648.49

2017	Winter	Midwest	Southeast	West	Northeast	Total
Funds remaining from previous year's scholarship allocation	\$0.00	\$0.00	\$0.00	\$349.97	\$370.97	\$720.94
Silent auction	\$7,569.00	\$3,256.00	\$5,738.47	\$9,582.46	\$3,863.88	\$30,009.81
Registration donations	\$0.00	\$75.00	\$35.00	\$50.00	\$225.00	\$385.00
Additional on-site fundraising	\$1,332.00	\$588.00	\$1,382.00	\$0.00	\$740.00	\$4,042.00
Annual appeal (mailing)	\$150.00	\$375.00	\$500.00	\$65.00	\$600.00	\$1,690.00
Bi-annual solicitation	\$5.00	\$30.00	\$30.00	\$5.00	\$105.00	\$175.00
#GivingTuesday	\$382.00					\$382.00
Online store	\$158.59	\$66.23	\$66.23	\$66.23	\$66.23	\$423.51
Total to allocate to 2017 sites:	\$9,596.59	\$4,390.23	\$7,751.70	\$10,118.66	\$5,971.08	\$37,828.26



YEAR IN REVIEW

FACULTY UPDATE

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)



YEAR IN REVIEW

FACULTY UPDATE

Institute sponsored faculty at the following conferences:

MAKO (Missouri, Arkansas, Kansas, and Oklahoma)

Sponsored Keynote Speaker: Justin Patton

April 24-26, 2016

Branson, Missouri

Approximate number of attendees: 215

Florida Association of Chamber Professionals (FACP)

Sponsored Keynote Speaker: Kyle Sexton

May 19-20, 2016

Tampa, Florida

Approximate number of attendees: 100

Illinois Society of Association Executives (ISAE)

Sponsored Keynote Speaker: Justin Patton

September 24, 2016

Springfield, Illinois

Approximate number of attendees: 115

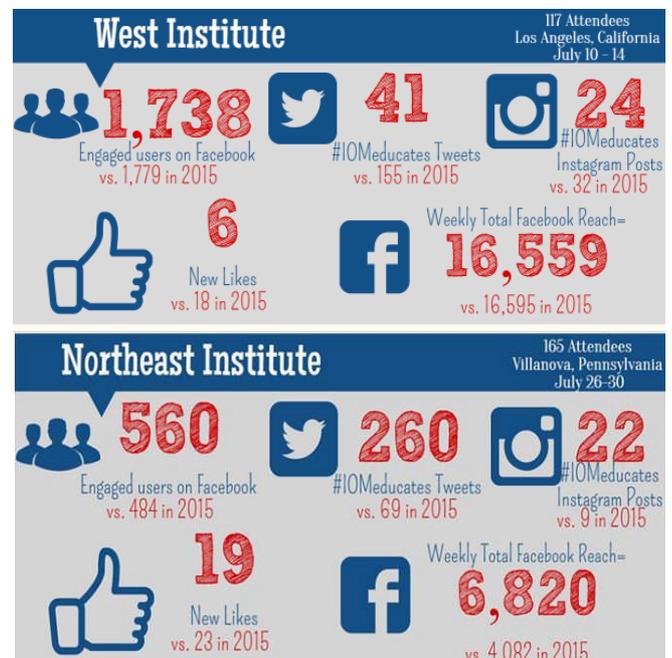
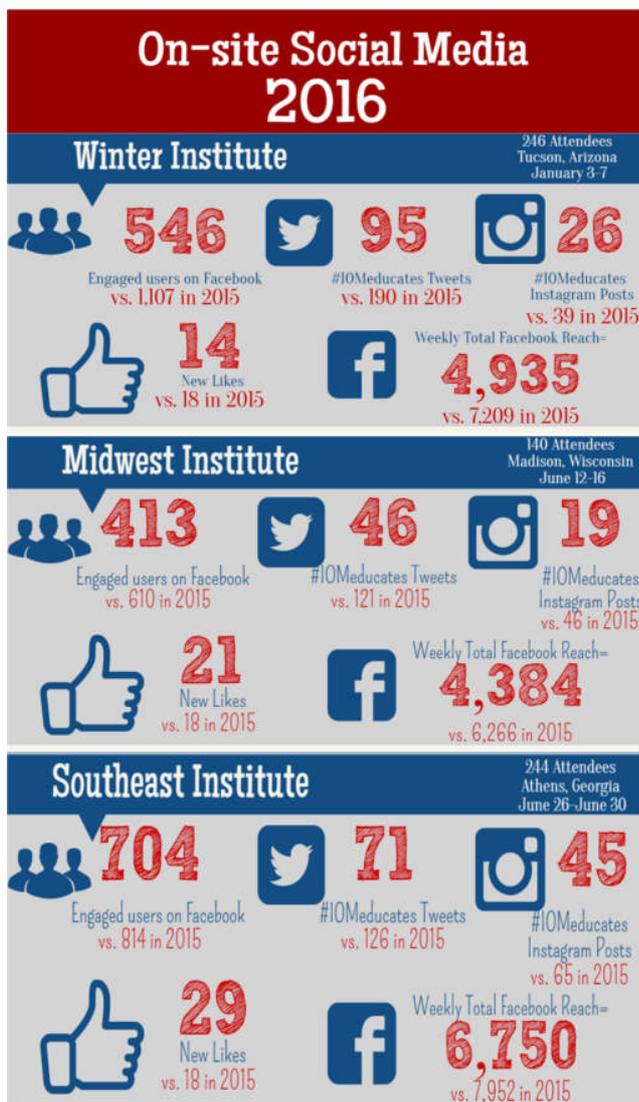


YEAR IN REVIEW

SOCIAL MEDIA UPDATE

	2015*	2016*	Percentage Increase
Facebook	2,116 Likes	2,428 Likes	15%
Twitter	1,361 Followers	1,572 Followers	16%
LinkedIn	1,983 Members	2,215 Members	12%
Instagram	145 Followers	269 Followers	85%
IOM Alumni Facebook Group	371 Members	409 Members	10%

*Numbers as of September 1



Institute:

- Encouraged social media promotion from board members through the creation of content calendars distributed to the Board of Trustees and each Board of Regents.
- Displayed daily social media prompts in each classroom on-site at select sites.
- Integrated Instagram into our social media strategy.
- Posted on the IOM blog 1-3 times each week.



YEAR IN REVIEW

VOLUNTEER UPDATE

Congratulations to all Board of Trustees, Boards of Regents, and Curriculum Committee members on a truly successful year! A special thank you to the Board of Trustees Chair, Bob Thomas, IOM, CAE, CMP, for his leadership and on-site engagement, as well as all volunteers for their continuous efforts to market the program this Institute season. Due to your hard work, the final enrollment for 2016 Institute was 912 overall attendees, 288 of which were first-years. As a point of reference, final enrollment was 876 overall and 303 first-years in 2015.

We are looking forward to a great year ahead!

Below are some highlights from 2016.

- Recruited 19 new Board of Regent members and 27 Class Advisors from various associations and chambers of commerce.
- Of the 27 Class Advisors, 21 were first-time advisors.
- 252 interested volunteers in our database representing 42 states plus DC.
- 34 states plus DC are currently represented on the boards and committee.
- 25 first-years were recruited from board members' organizations.
- 34 first-years were recruited from other organizations.
- 47 returning students were recruited from board members' organizations.

BOARD MEMBER RECRUITMENT GRID

On the following pages, you will find a copy of the 2016 Board Member Recruitment Grid, which helped to monitor Institute's outreach and recruitment. Please know this document represents a very small fraction of what you do every day to market the Institute program. We know that volunteer recruitment and action is the key to our success, and we thank you for all you do.

2016 Institute Volunteer Recruitment Grid

First Name	Last Name	Organization	Location	First-Years Recruited from Same Organization	Returning Students from Same Organization	First-Years Recruited from Other Organization
Blain	Andera	Spirit Lake Chamber of Commerce	BOT, Winter			Carina Woodward (1-Winter); Jeff Thee (1-Midwest)
Jeremy	Arthur	Chamber of Commerce Association of Alabama	BOT, CC			Monica Elmer (1-Southeast)
Steve	Baas	Metropolitan Milwaukee Association of Commerce	Winter			
Brian	Baker	Chateau Montelena Winery	CC			
Kara	Beer	Battle Creek Area Chamber of Commerce	Winter			
Alysia	Bell	Los Angeles Area Chamber of Commerce	West			
Christin	Berry	ASAE: The Center for Association Leadership	BOT, CC	Vivian Abalama (1-Northeast); Carla Lochiatto (1-Southeast)		
Rita	Berry	Greater Summerville/Dorchester County Chamber of Commerce	SE			
Greg	Buckler	Lebanon Valley Chamber of Commerce	NE		Bethany Houser (2-Northeast); Jessica Stankovich (2-Northeast)	
Dave	Butler	NextEd	West			
Jason	Camis	Gardner Edgerton Chamber of Commerce	West			Sharon Mitchell (1-Midwest)
Karri	Clark	Bozeman Area Chamber of Commerce	Winter			
Steve	Clark	Fayetteville Chamber of Commerce	NE		Jennifer Irwin (3-Winter)	
Kate	Conroy	New Jersey Business & Industry Association	NE	Ashley Lukens (1-Northeast)	Whitney Lewis (2-Northeast)	
Ali	Crain	Kentucky Chamber of Commerce Executives	CC, MW			
Kim	Dahlsten	Manhattan Area Chamber of Commerce	SE			Brittany Duplechian (1-Southeast)
Bryan	Daniels	Blount Partnership	SE		Jeff Muir (3-Southeast)	Marilee Harrison (1-Southeast)
Karen	DeVecchio	Bridgeport Regional Business Council	NE			
Cat	Dority	Charleston Area Convention and Visitors Bureau	BOT, CC			
Teresa	Eyet	American Health Care Association	CC, MW			
Dean	Faile	Lancaster County Chamber of Commerce	BOT, SE			
Tony	Felker	Frisco Chamber of Commerce	West	Phillip Sharp (1-Midwest)	Tami Alexander (2-Winter); Tami Alexander (3-Northeast)	
Mark	Field	Knoxville Chamber of Commerce	CC, SE	Lauren Longmire (1-Southeast)	Leslie Smith (2-Winter); Leslie Smith (3-Midwest); Leslie Smith (4-Southeast)	Brooke O'Dell (1-Southeast)
Bob	Foulks	Wisconsin Medical Society	BOT, CC	John Rather (1-Midwest)		
Rene	Gellerman	Quad Cities Chamber of Commerce	MW	Jessica Webb (1-Midwest)		
Alison	Grems	Canandaigua Chamber of Commerce	West		Elisha Everson (3-West)	
Jeff	Griffin	Peoria Area Chamber of Commerce	MW		Sherneka Cagle (2-Winter); Kelly Donnelly (2-Midwest)	Kerry Smith (1-Midwest)
Kim	Guida	Rochester Automobile Dealers Association	BOT, NE			
Heidi	Gullickson	Brookings Area United Way	MW			
Tracey	Halliday	American Beverage Association	MW		Franklin Davis (2-Southeast)	
Steve	Halter	Greater Poplar Bluff Area Chamber of Commerce	Winter			Hillary Speer (1-Winter)
Joe	Henning	Aurora Regional Chamber of Commerce	BOT, MW			Kyle Anderson (1-Midwest)
Lisa	Hermes	McKinney Chamber of Commerce	West	Robin Woodall (1-West)		
Ray	Hernandez	Lewisville Area Chamber of Commerce	West		Cristina Rodriguez (3-West)	
Mike	Hofman	Orange City Chamber of Commerce	Winter			
Liz	Horton	Kershaw County Chamber of Commerce & Visitors Center	SE			
Rick	Howe	Jackson Hole Chamber of Commerce	Winter		Maureen Murphy (3-Winter)	
Lisa	Hoyt	Petoskey Regional Chamber of Commerce	MW			
Dawn	Johnson	Muskegon Lakeshore Chamber of Commerce	MW			Roger Chamberlin (1-Midwest)
DJ	Johnson	American Society of Interior Designers	BOT			
Christine	Kennedy	Lynchburg Regional Business Alliance	SE			Teresa Hammond (1-Southeast)
Nick	Kieffer	Goshen Chamber of Commerce	Winter			
Avon	Knowlton	SWLA Economic Development Alliance and Chamber SWLA	NE	Brittany Duplechian (1-Southeast); Amanda White (1-Northeast)		Lisa Adams (1-Northeast); Lena McArthur (1-Northeast)
Brad	Lacy	Conway Area Chamber of Commerce	West	Laura Davis (1-West)	Luke Ferguson (3-West); Therese Pollard (2-West); Adena White (2-West)	
Russ	Lahodny	California Chamber of Commerce	BOT, West			

2016 Institute Volunteer Recruitment Grid

First Name	Last Name	Organization	Location	First-Years Recruited from Same Organization	Returning Students from Same Organization	First-Years Recruited from Other Organization
Jack	Lank	The United Regional Chamber of Commerce	Winter			
Bill	Lee	Gallup-McKinley County Chamber of Commerce	Winter	Anthony Dimas (1-Winter)		Debra Douds (1-Winter)
Dan	Lemyre	Association Headquarters, Inc.	NE			
Ruth	Littlefield	Tulsa Regional Chamber	Winter	Niccole Ferguson (1-Northeast)	Heather Davis (2-Winter); Brian Paschal (4-Midwest); Vince Trinidad (2-Midwest); Allison Walden (4-Southeast); Kuma Browne (2-West); Nick Doctor (4-Northeast)	Halley Trembath (1-Winter)
Claire	Louder	West Anne Arundel County Chamber of Commerce	NE	Marnea Shamblen (1-Northeast)		Stephanie Helsing (1-Northeast)
Kellie	Lowery	NTCA - The Rural Broadband Association	CC, NE	Jessica Golden (1-Northeast)	April Irwin (2-West); Laura Withers (2-Northeast)	Allison Ingram (1-Northeast)
Megan	Lucas	Lynchburg Regional Business Alliance	BOT, CC			Brandon Johannes (1-Winter)
Duffy	MacKay	Council for Responsible Nutrition	Winter		Mike Greene (3-West)	
Kelle	Marsalis	Dallas Regional Chamber of Commerce	West		Diana Rivas-Smith (2-Winter)	
Matt	McCormick	Columbia Chamber of Commerce	BOT, CC		Sedel Marino (4-Winter)	Wendy Rackovan (1-West); Stacy Needels (1-West); Mary Jo Little (1-Midwest)
Tim	McKee	Olathe Chamber of Commerce	BOT, CC		Brad Cornell (3-Midwest)	
Pete	McNamara	New Hampshire Automobile Dealers Association	NE		Ryan Hale (2-Northeast)	
Robert	Medler	Tucson Metropolitan Chamber of Commerce	Winter		Carissa Fairbanks (2-Winter); Laura Nagore (2-Winter)	Jaquie Miller (1-Winter); Bob Argelyn (1-Winter)
Crystal	Moore	Association of Chamber of Commerce Executives	BOT, CC	Danielle James (1-Winter); Michelle Vegliante (1-Winter); Analidia Blakely (1-West)		
Kimberly	Nastasi	Mississippi Gulf Coast Chamber of Commerce	BOT	Aisa Templeton (1-Winter); Olivia Munn (1-Southeast)	Kelsey Blum (4-Winter); Dhiana Mckaig (3-Southeast); Jenny Levens (4-Southeast)	
Douglas	OFlaherty	South Carolina Restaurant and Lodging Association	NE			Taryn Shekitka-West (1-Southeast)
Mike	Paone	Joliet Region Chamber of Commerce and Industry	MW			
Stephanie	Parton	Indiana CPA Society	CC, Winter		Nichole Favors (4-Winter)	Brad DuBois (1-Winter)
Jodie	Perry	Richland Area Chamber of Commerce	MW			
Heidi	Peterson	Wyoming Taxpayers Association	West			
Matt	Pivarnik	Greater Topeka Chamber of Commerce & GO Topeka	BOT, CC	Curtis Sneden (1-West)	Ashley Charest (3-Midwest)	Kinnee Tilly (1-Winter)
Tracy	Qualls	Choctaw Chamber of Commerce	Winter			Kinlee Farris (1-Winter)
Jackie	Rakers	Illinois Association of Mutual Insurance Companies	BOT, MW			Phil Lackman (1-Midwest)
Rick	Roden	Greater Jackson County Chamber of Commerce	SE			
Corey	Rosenbusch	Global Cold Chain Alliance	BOT	James Rogers (1-Winter)	Richard Tracy (4-Winter)	
Laura	Schoen Carbonneau	Pierre Area Chamber of Commerce	MW	Katie Johnson (1-Midwest)		
Teri	Smiley	Walton County Chamber of Commerce	SE			Andy Luker (1-Southeast)
Ed	Stolmaker	Marana Chamber of Commerce	Winter			
Carrie	Stuart	Gettysburg Adams Chamber of Commerce	NE			
Steve	Swafford	Leadership Outfitters, LLC	CC			
Bob	Thomas	Michigan Chamber of Commerce	BOT, CC		Brad Hantler (3-Winter)	
Marnie	Uhl	Prescott Valley Chamber of Commerce	BOT			
Tony	Vedda	North Texas GLBT Chamber of Commerce	West			
Ray	Villegas	Institute of Internal Auditors	SE			Jessica Golden (1-Northeast)
Marianne	Virgili	Glenwood Springs Chamber Resort Association	West	Cristin Barta (1-West)		
Chris	Wallace	Texas Association of Business	BOT, CC, NE			Dagmar Metzler (1-Northeast)
Scott	Waller	Mississippi Economic Council	SE	Jason Word (1-Southeast)	Kelly Boutwell (3-Southeast); Emily Bates (2-Southeast); Will Caves (2-Southeast)	
Angie	Whitcomb	Shakopee Chamber of Commerce	MW			
Jo	White	Greater West Plains Area Chamber of Commerce	NE		Jessica Collins (3-Midwest)	Antonia Eichholz (1-Northeast)
Stacey	Wilson	Indiana CPA Society	MW		Nichole Favors (4-Winter)	
Morri	Yancy	Lake Gunterville Chamber of Commerce	CC, SE		Amanda Sellnow (3-Southeast)	Wes Kitchens (1-Southeast)
Heidi	Zich	Home Builders Association of the Fox Cities	MW			



APPENDIX

TABLE OF CONTENTS

- 2016 Institute Attendee State Breakdown
- Winter Institute
- Midwest Institute
- Southeast Institute
- West Institute
- Northeast Institute



2016 ATTENDEES

ATTENDEE STATE BREAKDOWN

912 Attendees from 49 states and the District of Columbia

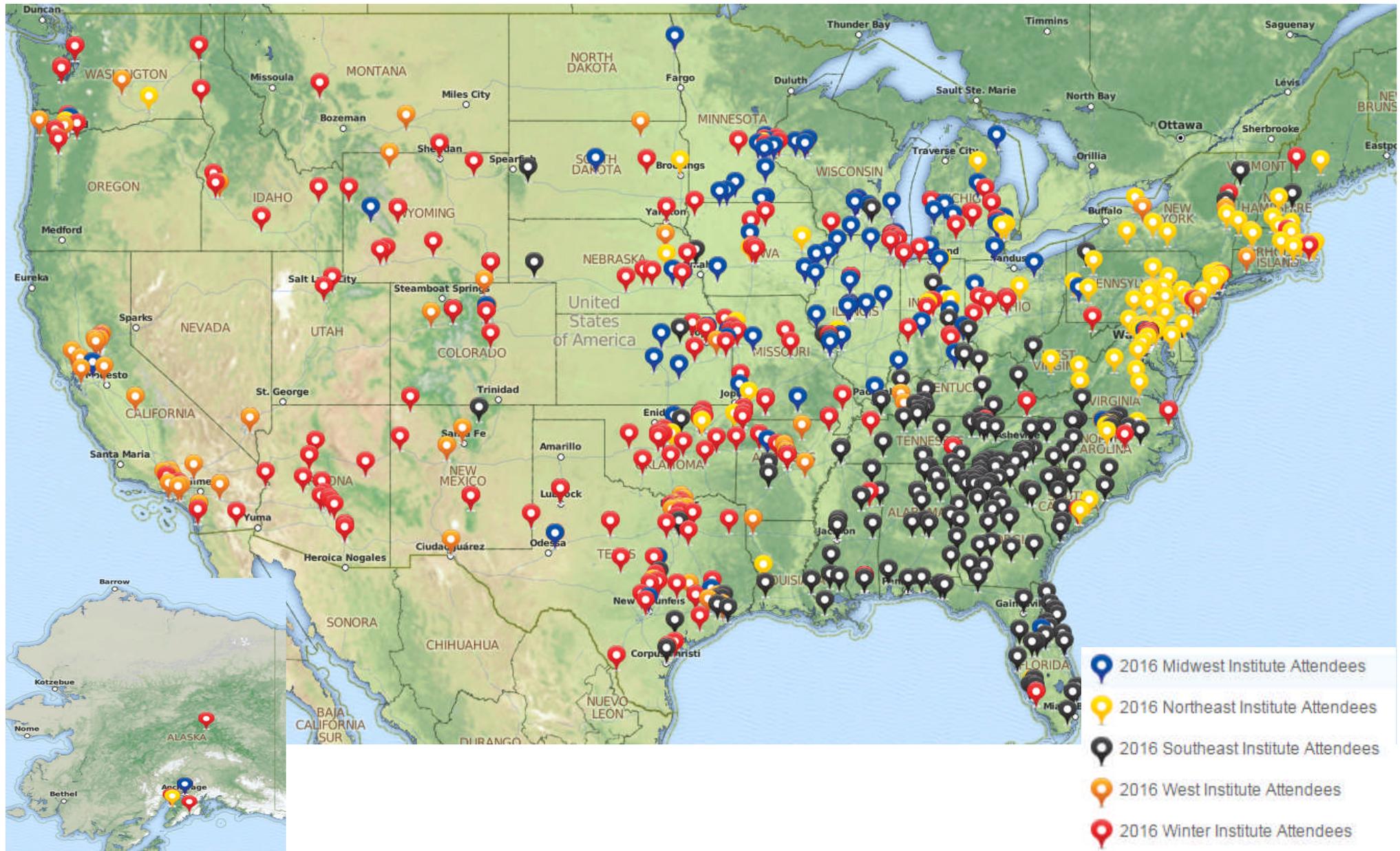
State, Number of Attendees, %

Alabama,	18,	1.97%	Montana,	2,	0.22%
Alaska,	11,	1.21%	Nebraska,	12,	1.32%
Arizona,	16,	1.75%	Nevada,	2,	0.22%
Arkansas,	30,	3.29%	New Hampshire,	2,	0.22%
California,	34,	3.73%	New Jersey,	8,	0.88%
Colorado,	12,	1.32%	New Mexico,	10,	1.10%
Connecticut,	1,	0.11%	New York,	10,	1.10%
District of Columbia,	64,	7.02%	North Carolina,	32,	3.51%
Delaware,	1,	0.11%	North Dakota,	1,	0.11%
Florida,	33,	3.62%	Ohio,	14,	1.54%
Georgia,	47,	5.15%	Oklahoma,	30,	3.29%
Idaho,	5,	0.55%	Oregon,	10,	1.10%
Illinois,	44,	4.82%	Pennsylvania,	17,	1.86%
Indiana,	21,	2.30%	Rhode Island,	2,	0.22%
Iowa,	23,	2.52%	South Carolina,	27,	2.96%
Kansas,	18,	1.97%	South Dakota,	6,	0.66%
Kentucky,	14,	1.54%	Tennessee,	31,	3.40%
Louisiana,	9,	0.99%	Texas,	76,	8.33%
Maine,	3,	0.33%	Utah,	2,	0.22%
Maryland,	9,	0.99%	Vermont,	1,	0.11%
Massachusetts,	18,	1.97%	Virginia,	58,	6.36%
Michigan,	21,	2.30%	Washington,	10,	1.10%
Minnesota,	13,	1.43%	West Virginia,	3,	0.33%
Mississippi,	23,	2.52%	Wisconsin,	19,	2.08%
Missouri,	25,	2.74%	Wyoming,	14,	1.54%

State not represented:

- Hawaii

2016 Institute Attendees



WINTER



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

2017 BOARD OF REGENTS ROSTER

CHAIR

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

PAST CHAIR

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

Kara Beer, IOM

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

Steve Halter, IOM, EDFP, PCED

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

VICE CHAIR

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

Steven Baas, IOM

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

Karri Clark, IOM

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

Mike Hofman, IOM

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

WINTER



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

2017 BOARD OF REGENTS ROSTER

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

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

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

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

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

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

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



WINTER

AGENDA

FRIDAY, SEPTEMBER 30, 2016

10:15 A.M. - 12:00 P.M. EDT

U.S. CHAMBER OF COMMERCE

WASHINGTON, DC

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

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



WINTER

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

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

I. Welcome and Introductions

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

II. Approval of Minutes

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

III. Staff Update

• Fundraising Update

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

IV. Review of Strategic Goals

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

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

V. 2017 Winter Institute

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

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



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

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

VI. Other Business/Adjournment

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

There being no other business the call was adjourned.

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



WINTER

2017 SCHEDULE OF ACTIVITIES

PLEASE NOTE THIS SCHEDULE IS TENTATIVE AND SUBJECT TO CHANGE

Wednesday, January 4

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

Thursday, January 5

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

Friday, January 6

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

Saturday, January 7

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

Sunday, January 8

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



WINTER

2017 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

Class Advisors

Stephanie Parton

Silent Auction/Fundraising

Nick Kieffer

Tracy Qualls

Industry Consultations

Steve Baas

Scholarships

Bill Lee

Robert Medler

Nick Kieffer

Institute Kickoff

Ed Stolmaker

Robert Medler

Kara Beer

Karri Clark

Duffy MacKay

Big Bash

Robert Medler

Ed Stolmaker

Lunch Roundtable Discussions

Rick Howe

Bill Lee

Mike Hofman

Association Dinner

Duffy MacKay (working with Jim Rogers)

Volunteer/Faculty/Staff Dinner



WINTER

GEOGRAPHIC BREAKDOWN

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

State, Number of Attendees, %

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

Top Increase Since 2015:

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

Most Attendees in 2015, Texas with 26

Most Attendees in 2016, Texas with 28

2016 Winter Institute Attendees





MIDWEST

2016 BOARD OF REGENTS ROSTER

CHAIR

Teresa Eyet, IOM
Senior Director, Conference Programming and
Educational Development
American Health Care Association
1201 L Street, NW
Washington, DC 20005
202-898-2837
teyet@ahca.org
Term: 2015-2016

PAST CHAIR

Jacqueline Rakers, IOM, PFMM
Executive Director
Illinois Association of Mutual Insurance
Companies
PO Box 116
Ohlman, IL 62076
217-563-8300
leadership@iamic.org
Term: 2015-2016

Jeffrey Griffin, IOM
President and CEO
Peoria Area Chamber of Commerce & The
CEO Council
100 SW Water Street
Peoria, IL 61602
309-495-5920
jgriffin@peoriachamber.org
Term: 2015-2017

Tracey Halliday, IOM
Vice President, Communications
American Beverage Association
1101 16th Street, NW
Washington, DC 20036
202-463-6732
thalliday@ameribev.org
Term: 2015-2017

VICE CHAIR

Jodie A. Perry, IOM
President
Richland Area Chamber of Commerce
55 North Mulberry Street
Mansfield, OH 44902
419-522-3211
JPerry@RichlandAreaChamber.com
Term: 2015-2016

Rene M. Gellerman, IOM
Senior Vice President, Membership
Quad Cities Chamber of Commerce
130 West 2nd Street
Davenport, IA/IL 52801
563-823-2662
rgellerman@quadcitieschamber.com
Term: 2011-2017

Heidi Gullickson, IOM
Executive Director
Brookings Area United Way
414 Main Avenue
Brookings, SD 57006
605-692-6125
Heidi@brookingsunitedway.org
Term: 2015-2017

Lisa Hoyt, IOM
Membership Director
Petoskey Regional Chamber of Commerce
401 East Mitchell Street
Petoskey, MI 49770
231-347-4150
lisa@petoskey.com
Term: 2014-2016



MIDWEST

2016 BOARD OF REGENTS ROSTER

Dawn Johnson, IOM
Vice President
Muskegon Lakeshore Chamber of Commerce
380 West Western Avenue, Suite 202
Muskegon, MI 49440
231-722-3751
johnsond@muskegon.org
Term: 2012-2016

Michael J. Paone, IOM
Vice President, Member Services
Joliet Region Chamber of Commerce and
Industry
63 North Chicago Street
Joliet, IL 60432
815-727-5371
mpaone@jolietchamber.com
Term: 2010-2016

Laura Schoen Carbonneau, IOM
Chief Executive Officer
Pierre Area Chamber of Commerce
800 West Dakota Avenue
Pierre, SD 57501
605-224-7361
laurasc@pierre.org
Term: 2010-2016

Angela Whitcomb, IOM
President
Shakopee Chamber of Commerce
PO Box 717
Shakopee, MN 55379
952-445-1660
awhitcomb@shakopee.org
Term: 2014-2016

Stacey L. Wilson, IOM, CAE
Director, Learning and Collaboration
Indiana CPA Society
8250 Woodfield Crossing Boulevard #100
Indianapolis, IN 46240
317-726-5015
swilson@incpas.org
Term: 2015-2017

Heidi Zich, IOM
Executive Vice President
Home Builders Association of the Fox Cities
920 West Association Drive
Appleton, WI 54914
920-731-7931
heidi.zich@hbafoxcities.com
Term: 2015-2017



MIDWEST

AGENDA

SEPTEMBER 30, 2016

10:15 A.M. – 12:00 P.M. EDT

U.S. CHAMBER OF COMMERCE
WASHINGTON, DC

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

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



MINUTES JUNE 12, 2016 12 NOON CDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

In attendance: Teresa L. Eyet, IOM; Jodie A. Perry, IOM; Jacqueline Rakers, IOM, PFMM; Rene Gellerman, IOM; Jeff Griffin, IOM; Heidi Gullickson, IOM; Tracey Halliday, IOM; Lisa Hoyt, IOM; Dawn Johnson, IOM; Michael J. Paone, IOM; Laura Schoen Carbonneau, IOM; Angie Whitcomb, IOM; Stacey L. Wilson, IOM, CAE; Heidi Zich, IOM; Jenna Armstrong, IOM; Timothy M. McKee, IOM; Diane Middleton, IOM; Dale Perrin, IOM; Lisa Weitzel, IOM; Karyn K. MacRae, IOM, CAE, CMP; Shelby A. Parish, IOM, CMP; Meghan Longenecker, IOM; Carly R. Turk

- I. Board of Regents and Class Advisor Working Lunch
The group reconnected over lunch.
- II. Welcome and Introductions
Teresa Eyet, IOM welcomed everyone to the meeting and introductions were made.
- III. Overview of Week
The group reviewed the schedule of activities for the week, which included a detailed review of evening events. Regents signed up for various on-site responsibilities and classes to audit throughout the week. Final enrollment and scholarship numbers were given, as well as updates on social media, fundraising, and incentives.
- IV. Responsibilities of Class Advisors
Specific Class Advisor responsibilities were discussed in detail. The first Class Advisor Broadcast was reviewed with the group and questions were answered. The role of the Regent Partner was also reviewed.
- V. Board of Regents Other Business
 - Approval of minutes
 - The minutes from the May 9, 2016 conference call were approved with no changes.
 - On-site regent responsibilities
 - Regent roles and expectations during the Institute week were explained. This included, but was not limited to: information on when to arrive at Grainger Hall every day; how they should network with attendees during meals and social functions; after-hours interaction with attendees; what to do while attendees are in class, etc.
 - Visiting Homeroom
 - Regents discussed the possibility of visiting each Homeroom.



MINUTES
JUNE 12, 2016
12 NOON CDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

- Importance of fundraising
 - The group was reminded of the various ways to fundraise and that all funds raised on-site go directly into the Midwest Regent Scholarship Fund.
- Additional business and adjournment
 - Any remaining business was discussed prior to adjourning the meeting.

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



MIDWEST

2017 SCHEDULE OF ACTIVITIES

PLEASE NOTE THIS SCHEDULE IS TENTATIVE AND SUBJECT TO CHANGE

Sunday, June 4

12:00 noon–12:30 p.m. Board of Regents & Class Advisor Lunch: Fluno Center, Room 219
12:15 p.m.–1:30 p.m. Board of Regents & Class Advisor Briefing: Fluno Center, Room 219
1:30 p.m.–1:45 p.m. Board of Regents Meeting – Additional Business: Fluno Center, Room 219
2:00 p.m.–4:00 p.m. Registration: Grainger Hall Atrium
3:30 p.m.–4:00 p.m. Graduation Rehearsal (*4th year participants*): Grainger Hall
4:00 p.m.–4:45 p.m. Homeroom: Individual Classrooms, Grainger Hall
5:00 p.m.–7:30 p.m. Institute Kickoff: TBD

Monday, June 5

7:00 a.m.–8:00 a.m. Registration: Institute Office, Grainger Hall, Room 1080
8:00 a.m.–11:30 a.m. Core Classes: Individual Classrooms, Grainger Hall (*Break: 9:30–10:00 a.m.*)
11:30 a.m.–12:30 p.m. Lunch: Gordon Avenue Market
12:30 p.m.–4:00 p.m. Core Classes: Individual Classrooms, Grainger Hall (*Break: 2:00–2:30 p.m.*)
1:30 p.m.–2:00 p.m. Class Advisor Meeting: Grainger Hall
7:00 p.m. Class Dinners

Tuesday, June 6

8:00 a.m.–11:30 a.m. Core Classes: Individual Classrooms, Grainger Hall (*Break: 9:30–10:00 a.m.*)
9:00 a.m.–9:30 a.m. Class Advisor Meeting: Grainger Hall
10:00 a.m.–10:30 a.m. Board of Regents Meeting: Grainger Hall
11:30 a.m.–12:30 p.m. Lunch: Gordon Avenue Market
12:30 p.m.–2:30 p.m. Elective Classes: Individual Classrooms, Grainger Hall
2:45 p.m.–3:30 p.m. 30 Ideas in 30 Minutes: Grainger Hall

Wednesday, June 7

8:00 a.m.–10:00 a.m. Elective Classes: Individual Classrooms, Grainger Hall
10:00 a.m.–10:30 a.m. Morning Break: Grainger Hall Lobby
10:30 a.m.–12:30 p.m. Elective Classes: Individual Classrooms, Grainger Hall
12:30 p.m.–1:00 p.m. Box Lunch: Box lunches available in Grainger Hall Atrium
1:00 p.m.–4:30 p.m. Core Classes: Individual Classrooms, Grainger Hall (*Break: 2:30–3:00 p.m.*)
2:00 p.m.–2:30 p.m. Class Advisor Meeting: Grainger Hall
6:30 p.m.–9:00 p.m. Graduation Ceremony Celebration: TBD

Thursday, June 8

8:00 a.m.–11:30 a.m. Core Classes: Individual Classrooms, Grainger Hall (*Break: 9:30–10:00 a.m.*)
9:00 a.m.–9:30 a.m. Class Advisor Meeting: Grainger Hall
10:00 a.m.–10:30 a.m. Board of Regents Meeting: Grainger Hall
11:30 a.m.–12:30 p.m. Lunch: Gordon Avenue Market
12:30 p.m.–4:00 p.m. Core Classes: Individual Classrooms, Grainger Hall (*Break: 2:00–2:30 p.m.*)
4:00 p.m. 2017 Midwest Institute Concludes



MIDWEST

2017 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

Class Advisors

Dawn Johnson

Silent Auction/Fundraising

1. _____

2. _____

3. _____

Industry Consultations

1. _____

2. _____

Scholarships

1. _____

2. _____

3. _____

Institute Kickoff

1. _____

2. _____

3. _____

Graduation Ceremony and Celebration

1. _____

2. _____

3. _____

Volunteer/Faculty/Staff Dinner

1. _____

Lunch Roundtable Discussions (Optional)

1. _____

2. _____

Scavenger Hunt (Optional)

1. _____

2. _____

Social Media Strategy (Optional)

1. _____

2. _____



MIDWEST

GEOGRAPHIC BREAKDOWN

2016 Midwest Institute 140 Attendees from 25 states and the District of Columbia

State, Number of Attendees, %

Alaska,	1,	0.71%	Missouri,	5,	3.57%
Arkansas,	3,	2.14%	Nebraska,	2,	1.43%
California,	1,	0.71%	North Carolina,	3,	2.14%
Colorado,	1,	0.71%	North Dakota,	1,	0.71%
District of Columbia,	10,	7.14%	Ohio,	5,	3.57%
Florida,	2,	1.43%	Oklahoma,	3,	2.14%
Illinois,	29,	20.71%	Oregon,	1,	0.71%
Indiana,	8,	5.71%	South Dakota,	1,	0.71%
Iowa,	12,	8.57%	Tennessee,	1,	0.71%
Kansas,	7,	5.00%	Texas,	5,	3.57%
Kentucky,	2,	1.43%	Virginia,	4,	2.86%
Michigan,	9,	6.43%	Wisconsin,	14,	10.00%
Minnesota,	8,	5.71%	Wyoming,	2,	1.43%

Top Increase Since 2015:

Illinois	+3
Arkansas	+2
Florida	+2
Iowa	+2
Kansas	+2
Minnesota	+2
Ohio	+2
Wisconsin	+2

Most Attendees in 2015, Illinois with 26

Most Attendees in 2016, Illinois with 29

2016 Midwest Institute Attendees



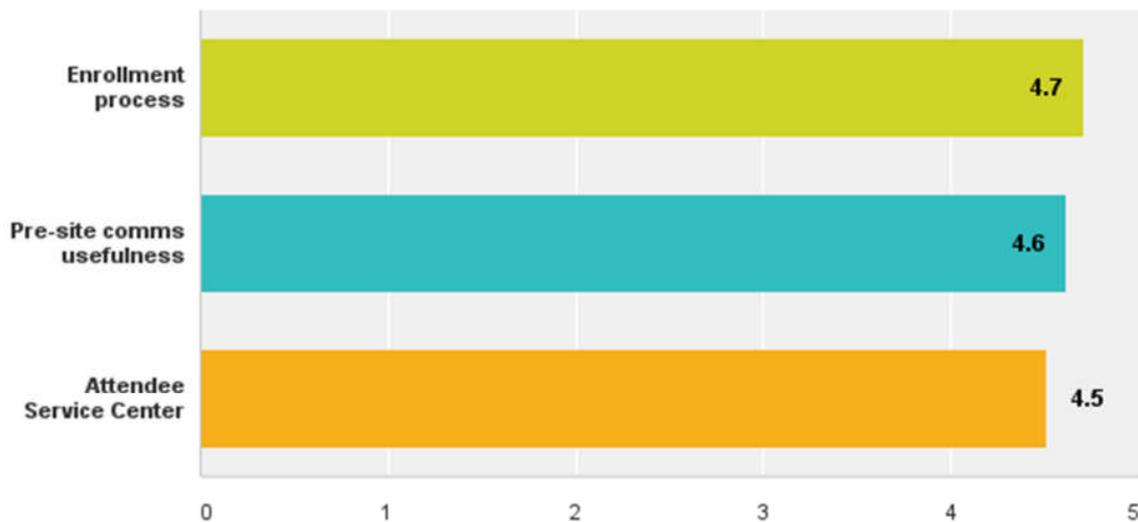


MIDWEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

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

Answered: 96 Skipped: 1



Additional comments about registration and communication*:

- Efficient set up.
- I love the Guidebook App!
- The mobile APP is very beneficial.
- It's hard to find the actual IOM class schedule online (core classes).
- There was lots of information that was not updated on the attendee service center.
- Great staff, very proactive.
- I thought it was weird to pick class 1-1 or 1-2. Couldn't you just sort us into classes after we register?
- Smooth process, as always.
- Dress code expectations in communications not representative of staff attire during event. Also, make ALL course handouts available in the attendee service center at conclusion of week.
- Much of the enrollment process, elective selection, and use of attendee service center is confusing and difficult to navigate for first and second time attendees.
- I wish all the instructors would post at least an outline of the course in the service center. Then we can have an idea of the content of the course.

*ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.



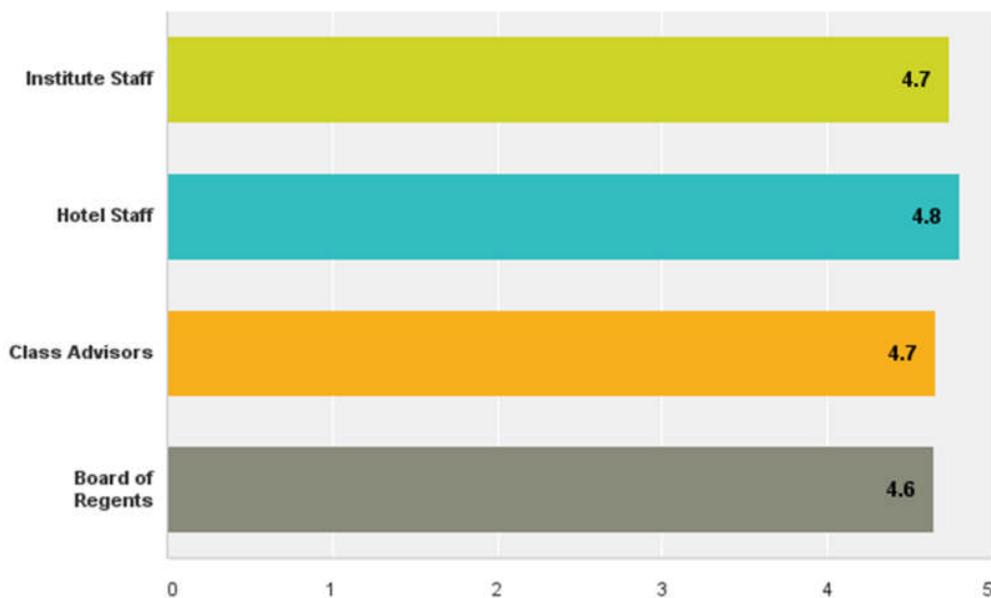
MIDWEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Easy to use.
- It was a great idea to refer new attendees to photos to help understand dress code.
- More flexibility in viewing and changing electives by separating as it's own section would be preferred.
- It was simple and to the point.
- Class roster was never available on the Attendee Service Center.
- First correspondence after I registered was that the hotels were full. Would have liked a little earlier info.
- Didn't realize there were 2, first year classes.
- The multiple emails sent around by the group could be minimized but understand that it is mostly important information.

Q5 Customer Service

Answered: 96 Skipped: 1



**ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.*



MIDWEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

Additional comments about customer service*:

- Everyone was so helpful!
- The only hold up the entire week was checking out for the silent auction. It was fine but took a little long.
- I want to thank Karyn for getting me information on parking for UW football games.
- Cannot say enough about Tim our class advisor.
- Institute Staff was wonderful as always!
- Lisa was a great class advisor. Very well organized and kept our group on-task, especially during the graduation process.
- I feel like Institute Staff and Class Advisors could do a little more outreach earlier in the registration and enrollment process. I felt my Advisor was disengaged this year. Hotel Staff at the DoubleTree was outstanding.
- Did not really interact with Board of Regents.
- The Fluno was excellent. I enjoyed the Institute and loved the classes.
- Excellent service all around, you can tell that everyone wanted to be there. Dale was excellent as an advisor.
- Everyone is so welcoming and helpful, not to mention knowledgeable!
- Extremely helpful group.
- Everyone was friendly and very helpful with any questions.
- The friendliness, helpfulness and knowledge of all is one of the reasons that this is a an awesome experience.
- Jenna Armstrong was AMAZING! I would like you to consider changing so classes can have the same advisor all 4 years. Relationships are built with the advisors in addition to our classmates.
- Great group of board of regents.

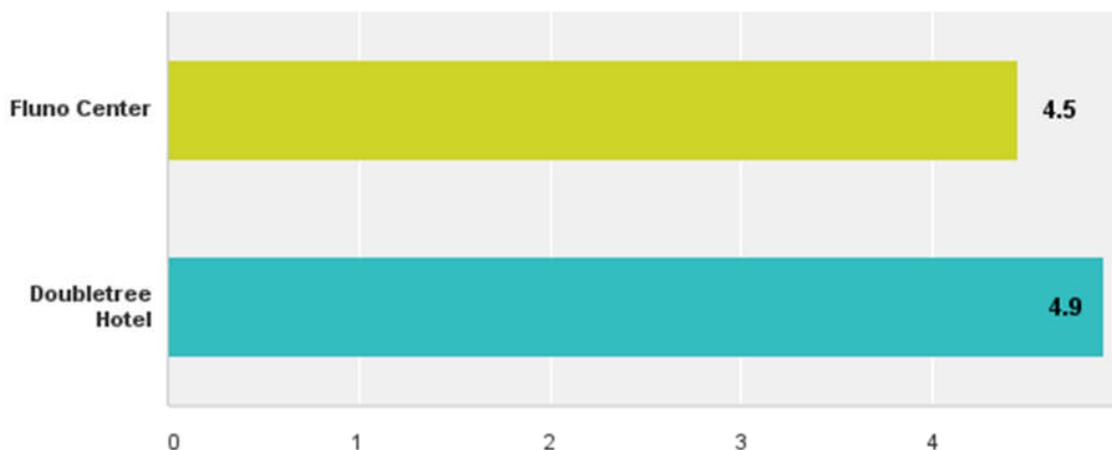
**ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.*



ATTENDEE SURVEY RESULTS AND FEEDBACK

Q8 How would you rate your accommodations?

Answered: 83 Skipped: 14



Additional comments about accommodations*:

- The staff is very helpful. They provided their shuttle several times for us.
- Accommodations were great and convenient. The only item I can find disappointment with was that you had to pay for a continental breakfast even after paying \$160 + per night.
- Great location, I was just not so thrilled with their housekeeping or cost for breakfast.
- Hotels book up so quickly... it's difficult to get rooms. But that is in no way a complaint directed toward Midwest Institute, just a comment that folks should secure living quarters soon.
- Excellent hotel----better service then most hotels.
- They went above and beyond in being helpful.
- Water parks galore! Loved it!
- I stayed at the Doubletree all four years and loved it. It is a really great property.
- Amazing.
- I appreciate the close proximity to class and fun.
- All in all, Fluno was great. Breakfast buffet was pricey, so I skipped it.
- Doubletree was great- close to campus, plus COOKIES!
- I had to find ways to save money to make Institute more affordable and staying at the Lowell Center saved me roughly \$600 to \$700 over the four years.

*ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.



MIDWEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- The Doubletree staff are very friendly and they were accommodating for our requests. The hotel was clean and comfortable. The walking distance was perfect between the different places we attended and the hotel shuttle was a nice option for days it was raining.
- Housekeeping staff was my only issue, all other things were great. Even the time we had out with our group doing other activities.
- The DT was very accommodating with their shuttles.
- Wished the Fluno had more places to congregate in the lobby.
- Hotel staff was amazingly accommodating!

Q10 Please rate your experience at the following Institute events.

Answered: 96 Skipped: 1



Additional comments about Institute events*:

- I wish there was a way to make the Big Bash a bigger part of the event. Maybe shifting to a DJ or band shortly after dinner ends might encourage folks to stick around longer than we did this year. The venue was excellent.
- There really isn't a Big Bash after the graduation ceremony. The graduation is nice. The food at the graduation was marginal.
- Kickoff was great, much easier to network. Big Bash was also awesome.

*ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.



MIDWEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Liked the idea of the scavenger hunt but it seemed like it was announced a little too late to get people on board.
- For the Bash, the program was efficiently run and the meal decent. Seemed a bit on the light side for food, although tasty.
- More structured evening activities would be appreciated, such as tours, active events, etc.
- It was very nice having the kickoff in a private room rather than in a restaurant.
- The kickoff was the best event, but the space felt a bit too tight for all of the attendees. Great venue/location, but the size of it impacted networking ability. An idea for the future to help networking - have regents or other senior leaders have "ask me about..." buttons/badges so that newbies know what to talk to them about. Or, put up placards at networking tables that say "association leaders" or "small chambers" or "diversity" to help facilitate conversation with people who are interested in those topics. All week I was looking for association people and had a hard time identifying who they were.
- Loved the new location of the big bash!
- The sound was off in the Big Bash room, you could really only hear the DJ and the music as you got closer to that side of the room.
- The reception was awesome, the group kickoff in the auditorium was too long.
- Kickoff was fun, I just wish the room had been slightly bigger, had more tables, and a little cooler! The graduation ceremony moved fast, which was nice, but the room emptied out as soon as dinner was over. It would have been nice to have more time to network in that environment, rather than at the bar afterward.
- The Kickoff was great, albeit somewhat tight quarters for the amount of people. The Big Bash was nice, but very quick - could've gone a bit longer.
- Kickoff is a little long. After traveling all day, don't need a lot of speeches.
- I know planning and implementing the Graduation Ceremony is a challenge. Our upcoming graduation class is very interested in being involved in the planning process as many in the class are located in Madison and have strong connections with the business community.
- Would have sat with my class if I'd understood the purpose of the kickoff. Would be good to understand significance of IOM certification from someone who's earned it. Venue for Big Bash was really nice.
- If you are going to give us Tuesday afternoon off, I would prefer the entire afternoon completely off, to pursue fun activities around Madison. It is a great city and I would like to experience more of Madison.
- Great location for the Big Bash!
- The kickoff room was too far away (at least by the path the group was taken via the Union Terrace) and the room was not comfortable. Too hot, and not enough staff for the bars.
- The speech at Kickoff was good and not too long. It was nice to get to know who is who. I did not attend the Graduation or the Big Bash because I did not feel well.
- The buses were scheduled to arrive as dinner was ending. I know that they were pushed back, but it seemed rushed.

**ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.*



MIDWEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- The only issue with the kickoff was lack of seating and it was a bit warm.
- Kickoff started early, which made me late when I arrived on-time. The reason I wasn't with everyone else was that there was no secure place for my laptop. It was later shared that the office could be a place to leave items, but this was not communicated soon enough. I walked back to the Fluno Center to leave my computer. It would have been awful to bring the laptop with me everywhere. (I had it with me for the technology and pre-homeroom and it turns out not to have been necessary). In sum, better communication is needed about valuables, etc., especially with opening sessions going straight to social activity.
- Kickoff - I liked the set up better this year- it allowed for more networking than Buffalo Wild Wings the year before.
- Graduation - Nice ceremony, but not sure about the "Big Bash" part...everyone up and leaves as soon as dinner is over. Is there supposed to be a dance? The bars are fun, but we do that every night so I think a dance/bash would be a fun change of pace...I think it just needs to be encouraged more.
- Zumba - fun! Bob was great!
- Kickoff was great, but room was hot and there were not enough stand-up tables.
- Kickoff is always a strange event. I liked when we did an activity to start things off and had a chance to sit down and eat too.
- Graduation Ceremony was very nice and the location was beautiful. I would recommend somehow separating the Big Bash, since in Midwest everyone leaves quickly after graduation. I think there needs to be some kind of draw to stick around for the bash or perhaps have it on a separate night. Another suggestion would be to offer a better segue between both so it's more pronounced. It always just seems like the events over once dinner and ceremony are done.
- Food wasn't that great but ok.
- There were not enough tables/seats at the kickoff which made it difficult to eat and talk to people. Also was not a fan of the food. At the site I attended last year we had a sit down dinner, which I think is ideal.
- Big Bash location was beautiful and food was good. I was surprised it ended so early and would have loved to see it continue a little longer.
- The course offers a solid professional curriculum, but would be a better experience if conducted like a normal professional classroom experience without the cheers, fanfare, and other silliness that cheapens and confuses the experience. Allow the participants to have the experience and benefit of a professional course sans cheerleading for "Institute."
- Kickoff still seems awkward - wish I had some suggestions on how to make it better. The venue for the the graduation was gorgeous but too far away - it felt like a mass exodus when the buses came. Food at graduation was not very good, but staff was friendly and helpful. Ceremony was smooth.
- Although there was nothing wrong with Kickoff, I have attended many week long conferences in my previous career and just think there are things we could do to really bring up the energy level.

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MIDWEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

Music (rock jams) can really get a room excited! "Get Ready for This" is a great one. Every get clapping at the beginning. Just a thought to add "a little something" to the beginning.

- Great if Bash was more of a bash where people stick around for longer. There would need to be later shuttles of course.
- Did not go to Zumba, used that time as a team building for my class. Also, wish people would stay longer at Graduation.
- The graduation ceremony was great. There was confusion by the bus driver about what time it was over. We were told bus would leave at 9:35 and he said 9:05. We left at 9:15. Venue was beautiful.
- My plane was delayed and I didn't make it to the Institute Kickoff, darn it!
- Institute Kickoff was in a VERY small area, extremely hot, not enough seats, not a real meal. Many of us only stayed a few minutes because it was not enjoyable.
- Graduation did not start on time at 6:30...it was after 8pm before we were ever served dinner. It never really changes into the "big bash" so everyone leaves. Food tasted like a microwave dinner.
- There could have been more room at the Kickoff, seemed crowded. Our class talked about how there should be some sort of dance/bash after the meal at graduation.

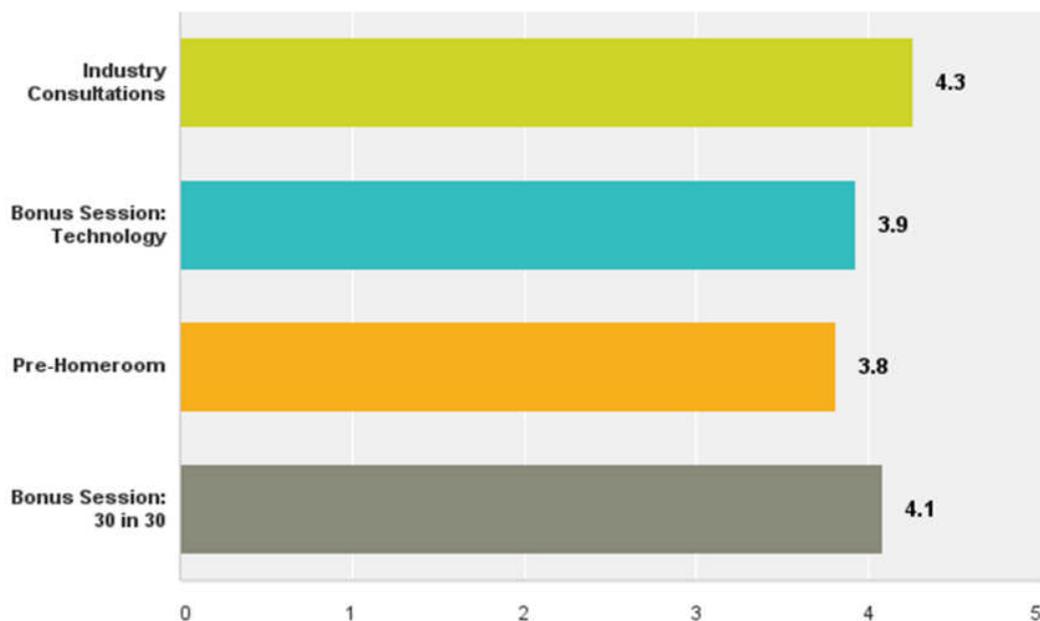
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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q12 Please rate your experience participating in additional learning opportunities.

Answered: 94 Skipped: 3



Additional comments about learning opportunities*:

- Was interested in the 30 ideas bonus session, but ended up choosing networking with my class.
- I don't understand the purpose of pre-homeroom. We covered the same topics that we covered in homeroom and there was no clear added benefit. I was exhausted because I had an early flight, and wish I skipped this and took a nap so I was more ready for the rest of the afternoon/evening. The industry experts, some were great, but not all. I think it is important for teachers to be pushed to incorporate both association and chamber examples into their teaching. A heard too many times "I don't have an association example," and I think this is just lazyness and not looking. The examples are there, and since the class has both types of attendees in it, a good teacher needs to include both examples.
- Was planning to participate, but had travel delays.
- Can we get a copy of the 30 ideas if we weren't able to attend?
- I wasn't aware of 30 ideas in 30 minutes.

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MIDWEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- One of my consultation requests for committee reorganization was never addressed and my request for Lead Investor retention strategies could not be fulfilled. They matched me with the Peoria Chamber, but we were already on the same page as them.
- I was able to speak with my requested consultant, but almost wasn't. If possible, it would be nice to have a time set aside just for this so we don't have to rush during lunch or breaks.
- Many of the folks in the room were caught off guard when they did not have a "gem" idea prepared to share. The direction for everyone to "come prepared to share a great idea" would have been helpful.
- LOVED the 30 Ideas in 30 Minutes. I also enjoyed the pre-home room and technology sessions. A bit frustrating that there were attendees who chose not to go and then asked all the questions covered in these sessions throughout the 1st day. Maybe required for 1st years? Took up time we could have been asking/learning something else if they would have just attended the sessions.
- More focus on associations throughout training.
- Did not get to bonus session.
- Pre-Homeroom is not necessary for anyone other than first year.

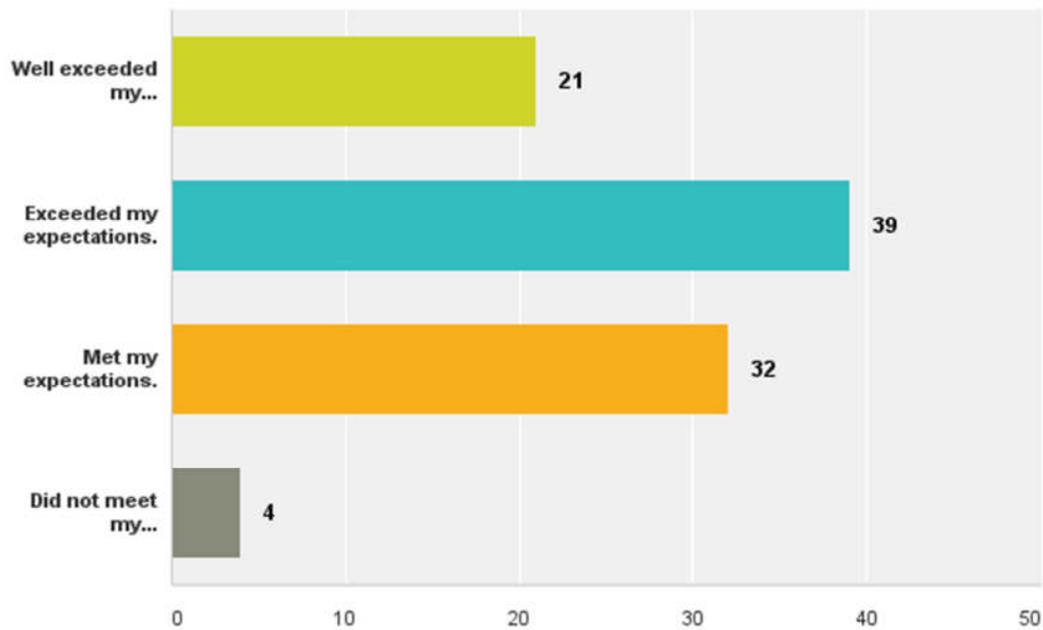
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ATTENDEE SURVEY RESULTS AND FEEDBACK

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

Answered: 96 Skipped: 1



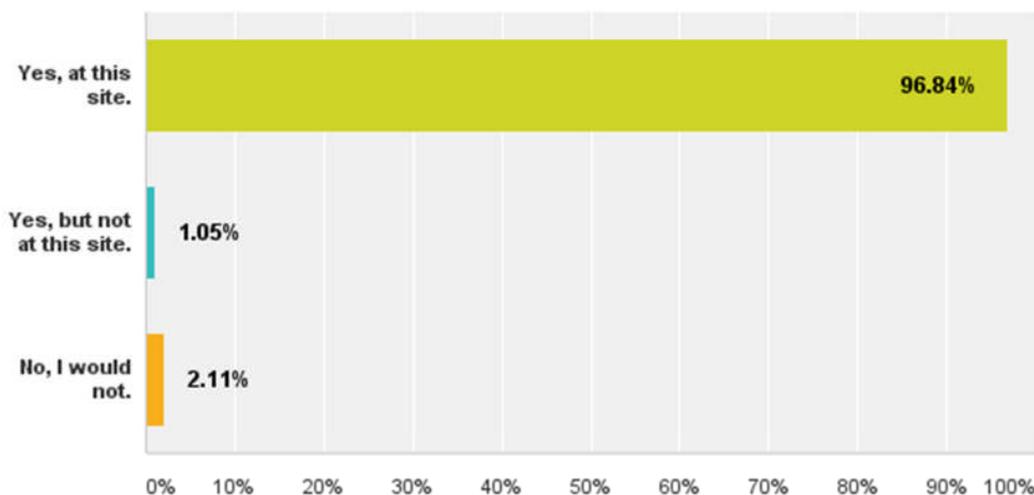
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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q19 Would you recommend Institute to other nonprofit professionals?

Answered: 95 Skipped: 2



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

- Best practices for working with elected officials.
- Business retention and expansion.
- I need more classes focused on associations. Several instructors had no experience or case studies related to associations. It would be awesome if you could provide two different tracks - one for chambers and one for associations. The networking is great but the education is lacking in the association space.
- I cannot think of any at this time.
- I work at the headquarters of a large trade association. I find most of the curriculum is geared toward chambers or state/local associations. Would be nice to have content for trade association headquarters.
- Hard to know because I was a first year, but I hope to see courses on strategic planning, board engagement/coaching, relationships with outside vendors/service/counsel, principles of management/staff supervision, more in depth financial education.
- Event Management and how to recruit more volunteers.

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MIDWEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I would like to have scale factored into some classes so that it can relate more to the larger chambers (state or USCC Foundation). The classes that I was most excited about had good content, but the scale and content was so different.
- The electives were some of my favorite courses. I'd like to have the chance to dig in deeper on them -- sponsorship solicitation, building committees, strategic communications.
- I think you cover most of the basics concepts that apply to everyone.
- Employment law.
- 1. Time Management. 2. How to run a successful Foundation. 3. How to deal with leadership changes.
- The Institute curriculum is well-tailored. I encourage staff and the curriculum committee to maintain and demand a respected standard of faculty. Please keep the curriculum high-level and don't be tempted to delve into touchy-feely/fluffy topics (which tend to be more life-coach oriented). Keep professional development professional!
- The topics were good. Some speakers were not. I expected graduate level courses. Most of the topics I'm interested in are offered 2-4 years, but maybe some technical skills classes on ChamberMaster, QuickBooks, Constant Contact, etc.
- "Storytelling" is now a popular course at universities - I think learning more about how to tell an organizations story in a compelling way would be useful.
- A little bit stronger content...more challenging.
- An actual course on networking, teaching us introverts to better interact.
- Including more content relevant to associations would be nice but I still think that a program geared toward chambers had excellent universal application.
- I would like to see the material more challenging, higher caliber.
- I thought as a first year student the courses covered a wide variety of topics.
- I think overall the classes were pretty good.
- ChamberMaster.
- Strategic Planning for a successful Chamber/Association, Building a Leadership Team, Generational Gaps.
- In the three years I've been attending, I feel that Institute has covered every area of my profession. Maybe an "organization" class to deal with specific needs for our profession - spread sheets, short cuts, etc.
- The two dues related sessions that I attended were geared to chambers and not applicable to national trade associations.
- I would like to see some form of leadership specific curriculum added in at least the elective side. I've had the benefit of attending leadership development professional development and have found myself using it in all levels of my work and private life. I'm not currently in the CEO level of my organization and based off some of the interactions we had in class, I think several others in my class would benefit from that type of training. Ed O'Malley with the Kansas Leadership Center

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MIDWEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

would be both a great speaker/presenter but also a resource for researching if this curriculum would be a good fit for IOM.

- More on communications strategies-working with the media, producing publications, writing/exciting articles, etc.
- It would be helpful to have working sessions with similarly sized organizations. Many of the great suggestions I heard were from Chambers with much larger staffs than mine.
- Course offering seems comprehensive and appropriate. Unfortunately, four of the course electives I took were instructed by two instructors who used much of the same material in the two courses they instructed. This seemed like waste of time and money, and the instructors should have been better prepared. Two other courses that I took were, in my opinion, a waste of time and money. The balance were productive and beneficial, however.
- Events.
- Hard to say b/c I'm not sure what the next 3 years will cover. Loved my experience. Now my only dilemma is whether to fast track or stay with my class. Can't wait for all the knowledge but love the relationships I have built in 1 short week. I can only imagine what it would be after 4 years!
- More on associations and how to engage younger generations.
- Would like to have a stronger discussion on higher levels of social media. The social media given was very basic. Also, would like to have a discussion on how to attract business on a larger scale and what we can do for areas that are not large cities.
- The new changes to FLSA would have been a timely topic as it affects so many of us.
- I am new in my position and would like more information on how chambermaster can help with different marketing tools.
- The sessions were all very basic and vague. Too many "associations" are allowed to attend. Much of the conversation was directed in a way other than chamber relations in most of my classes.
- I think the "Executive Finance" title should be changed to a more tax specific class. If you have the impression that it expands on the initial financial fitness class, you will be disappointed.

Additional comments about Institute*:

- Institute offers great professional Networking opportunity.
- It would be great if the curriculum was based on Association Management as well. It seems to be more centered toward the Chambers of Commerce.
- I had a great 4 years and learned a lot. Every year I would complain a little bit about the fact that most classes focused more on Chamber rather than Association work and having the instructors just say "and associations" didn't necessarily make it relevant to associations, at least not my association. That having been said it was a fantastic educational and social experience.
- Great job! Everyone was helpful, friendly and knowledgeable. Thank you for providing this opportunity.

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MIDWEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Classroom space was good. I thought the temperature was fine. Some thought it to be cold. Snacks and drink offerings was good. Just need a bowl of ice for drinks.
- The culture of going out every night to "network" is promoted by class advisors & regents. For introverts or individuals with health restraints this is an unneeded pressure. I've heard complaints about this culture from multiple people. There is a difference between inviting & giving someone a hard time about it. I also heard a fellow student talking about people who weren't staying out as if they shouldn't be getting credit for IOM.
- Thanks for a great experience. Looking forward to next year.
- Great program! Have one of my staff attending Tuscon - would have sent to Madison but those dates don't work with her schedule.
- Thank you for offering an atmosphere that brings us together, rather than isolating and separating us.
- The first year curriculum was too basic overall. I learned a ton from Bob Harris (I had him for 3 sessions), but the others were at a level beneath my experience. I had a major concern with Diane, the instructor for ""Unleashing the Leader Within."" Towards the end of class, a classmate asked a question about knowing what strategies to use when managing a difficult employee. Diane didn't provide a clear answer, so I followed up and pushed for more, since I have a similar problem. She was unable to provide more detail in her answer, and made me feel belittled for asking the question. The only answer she could give me was "set deadlines with your employees," and said if I did that, it would solve most, if not all, of my problems. After feeling belittled and dismissed, I stopped participating in the conversation, and then later she returned to me and told me that we could speak after class if I wanted additional help. I replied that I was looking for help in developing new ideas for how to manage difficult situations, and wanted to incorporate more tools/examples/ideas into my management skill set, and was disappointed that she wasn't able to provide that. (and, others in my class wanted to same information, so talking afterwards wouldn't help us all learn). The exchange was a bit heated, and it was one of the only times that my advisor looked up from his laptop during this class.
- While I'm not usually one to complain, I found that the way Diane conducted herself during class wasn't professional, and I was disappointed with her lack of examples and lack ability of provide depth to the conversation. She doesn't have an IOM, CAE, or CCE designation, and I really wonder what her strengths are to teach to chamber and association leaders.
- Can't wait until next year!
- I think the rooms were a little dusty, I kept sneezing during the sessions!
- Excellent program!!!
- My main concern was that several of the instructors covered similar topics, or would refer to similar ideas but use different names (i.e. whether a member is invested with time, money, transactional, and/or aspirational).
- I have wanted to attend IOM for several years, but have not had the opportunity. I have been in my position as executive for 14 years and during that time have had the good fortune to hear most of the instructors at either a state or regional conference. Even so, the time spent at Institute was

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MIDWEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

well worth it. I gained some new information, some refreshers and just as important, met new colleagues from around the country. I'm so glad to have started my journey towards IOM certification and look forward to 2017!

- To follow up with a comment from above. Our class would like to help plan the 2017 Graduation and Bash Ceremony. We have several people in the class that have connections with the Madison community and might be of assistance in making it memorable for all. I realize there is a budget so that would be taken into account. We would love to have all possible venues considered, possible band, outside guest speaker, and a toast for all. Hopefully an open conversation about this could be considered.
- Great introduction to the program, and great networking opportunities as well. I look forward to continuing next year!
- Thanks to all who helped make Midwest Institute 2016 a memorable one for our graduating class. It's been a really wonderful experience.
- Perhaps first years could be matched with a 3rd or 4th year for additional mentoring. Good way to set the stage for future enrollments, also. Surprised the Madison Chamber and CVB weren't present to welcome people and offer a walking food tour of State Street, or a bike tour near the lake. Really need to up the caliber of some of the core classes. Info was really basic. Others were phenomenal. Appreciate the opportunity to review them all.
- Midwest Rocks!
- Would be good to find a way to provide networking opportunities between the various classes.
- Great program, looking forward to year 3.
- "Have registration/homeroom in the morning on Monday and make all requirements start at that time instead of on Sunday night. Make all of Sunday's activities optional.
- Do the boxed lunch on Thursday afternoon (instead of Wednesday) and have shorter (15 min?) breaks that day. Some people leave early to catch flights and the breaks seemed long since we were wrapping up the week. Don't cut out class time, just cut out the in-between times to help get people on the road on Thursday.
- I don't think the dinners/graduation/big bash should be as "forced" as they were. In my class, there were several people from the same chamber/association who tended to be with each other and sit with each other everyday. It seemed a bit clicky at times and to me I think guests should be able to come to every "after (class) hours" event because of this. I don't think the "networking" events after the classes should seem as required as they appeared to be (even though they weren't). After a long day of networking and classes, I personally didn't always have the energy (especially since I wasn't feeling well) and I also had other work/emails I had to attend to.
- I recommend it to someone new to his/her career. Everything is learned through the "school of hard knocks" if you have been in the industry for a while.
- The Leadership speaker was the most disappointing. It would be awesome to bring in a well known speaker for the topic and have them speak to the entire group in one of the large auditoriums. Just an idea.

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MIDWEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- The faculty was excellent. Most provided great relevant information and others missed it. Bob Harris always provides great information. In 2nd year, Managers Who Motivate could use some improvement...or needs to be renamed. I was underwhelmed with the content.
- "A thought about dress code. Somehow, the casual dress code detracts from the sense of professionalism. On one hand, I can appreciate making the IOM experience pleasant. But I also think business casual is pleasant enough!
- Another thought is that the 990 form could be a class in itself, broken out of the other two classes that covered it briefly. I think the 990 was short changed. Meanwhile, there is no shortage of other finance/governance material to cover.
- I love Institute. It is the best post-graduate / certification conference/seminars I have attended. I think some speakers are great the first and second year, but by Year 3, other experts should be introduced, specifically David Aaker and Pat McGaughey. Love them both, but after hearing them the first two years, their info is pretty much the same in Year 3. Please do not have them for Year 4.
- Terrific program. It would be great to have resources from it easily available for IOM's to refer back to after the program is complete for electives not taken or areas not covered.
- Institute was well worth the time and money invested.
- Thank you!
- I appreciate the fact that you continue to tweak and improve. I learn more and more every year and love the bond with my class.
- I was hoping there would be more trade association people in attendance. I also thought there should have been more interaction between the two first-year groups especially due to the low numbers of association attendees.
- Overall, I thought that Midwest IOM was a great experience again and am recommending it to others I think could benefit from this program. Couple of suggests in no particular order.
- Leadership skills is a must, I believe, for non-profit organizations. Adding this curriculum would help individuals that aren't natural leaders find tools and skills that will assist them long term. (maybe this is already in the curriculum and I haven't experienced it yet).
- Start the classes on Sunday night after homeroom/kickoff and get us on the road Thursday afternoon at 2 or 3pm instead of 4pm.
- This year's courses did not seem as well organized as last year's. A couple of the classes almost felt like some sort of throw together class just to fill time.
- Love that there was food available at every break (And it was delicious!) However it would be nice to have the breakfast food BEFORE the first session rather than at the break, and have a smaller snack instead during the break. Since we eat lunch only two hours later, having the heavier foods later means less room for lunch.
- I personally would prefer the big bash and graduation be on the last night rather than the night before. It makes it difficult to focus the last day when we feel like we've ""finalized"" everything the night before.

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MIDWEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- It would be great to update the attendance lists for classes more often, so changes made onsite would be reflected in attendance sheets.
- Please see previous comments. While the balance of the courses are beneficial, IOM and the course participants would be better served if the course materials were thoroughly reviewed by the Regents to ensure quality material and to ensure that the material in courses is not duplicitous. Much of this material could also be easily disseminated through an on-line course, webinar, or correspondence just as effectively but without the expense of a week of on-location travel expenses for a week, which is very important for those in the non-for-profit industry.
- This was an awesome program! So happy I attended! Looking forward to next year!
- All instructors where absolutely amazing. Diane Consolino was not up to Institute standards.
- Would love for the mornings to start a bit later, especially on Thursday.
- The staff was wonderful and very inviting. This is a great way for people to learn and develop. This also provides a great way for other organizations to learn about each other. When I started, I did not know about all the other organizations out there.
- The breakout area could use additional high top tables. 3 was not enough.
- It was great experience and I am excited to go back next year!
- We need more in-depth classes. Government and Policy classes should NOT BE REQUIRED. Those do not relate to anywhere near everyone.

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Institute for Organization Management

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Institute for Organization Management

2016 ROSTER

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SOUTHEAST

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

AGENDA

SEPTEMBER 30, 2016

10:15 A.M. – 12:00 P.M. EDT

U.S. CHAMBER OF COMMERCE
WASHINGTON, DC

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

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



MINUTES

JUNE 26, 2016

11:00 AM EDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

In attendance: Mark L. Field, IOM, CCE; Kimberly Dahlsten, IOM; L. Dean Faile, IOM; Rita Berry, IOM, CCEC; Bryan Daniels, IOM, CCE, CEcD; Elizabeth Horton, IOM; Christine Kennedy, IOM, CPC, ELI-MP; Rick Roden, IOM; Teri H. Smiley, IOM, GCCE; Raymund Villegas, IOM; Scott Waller, IOM; Morri Yancy, IOM; Pamela Christopher, IOM; Amy Cloud, IOM; Elisabeth B. Deville, IOM; Henry Florsheim, IOM; Pammie Jimmar, IOM; Johanna McWilliams, IOM; Beth Morrison, IOM; Jennifer Romberger, IOM; Kelly Wallace, IOM; Karyn K. MacRae, IOM, CAE, CMP; Shelby A. Parish, IOM, CMP; Meghan Longenecker, IOM

I. Welcome and Introductions

Mark L. Field, IOM, CCE welcomed everyone to the meeting and introductions were made.

II. Board of Regents Business

- Approval of minutes
 - The minutes from the May 11, 2016 conference call were approved with no changes.
- On-site regent responsibilities
 - Regent roles and expectations during the Institute week were explained. This included, but was not limited to: information on when to arrive downstairs every day; how they should network with attendees during meals and social functions; after-hours interaction with attendees; what to do while attendees are in class, etc.
- Regent Meetings
 - Regents reviewed the schedule for meetings throughout the week.
- Visiting Homeroom
 - The group discussed visiting each Homeroom class.
- Additional business
 - Any remaining board business was discussed.

III. Class Advisor Welcome and Introductions

Kimberly Dahlsten, IOM welcomed the Class Advisors to the meeting and introductions were made.

IV. Responsibilities of Class Advisors

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



MINUTES

JUNE 26, 2016

11:00 AM EDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

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

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



SOUTHEAST

2017 SCHEDULE OF ACTIVITIES

PLEASE NOTE THIS SCHEDULE IS TENTATIVE AND SUBJECT TO CHANGE

Sunday, June 25

11:00 a.m.–11:30 a.m. Board of Regents Meeting: UGA Hotel, Room R
11:30 a.m.–12:15 p.m. Board of Regents & Class Advisor Briefing: UGA Hotel, Room R
12:15 p.m.–12:45 p.m. Board of Regents & Class Advisor Lunch: UGA Hotel, Room R
12:45 p.m.–1:00 p.m. Board of Regents & Class Advisor Additional Business: UGA Hotel, Room R
2:00 p.m.–4:00 p.m. Registration: UGA Hotel, Pecan Tree Galleria
3:30 p.m.–4:00 p.m. Graduation Rehearsal (*4th year participants*): UGA Hotel, Mahler Hall
4:00 p.m.–4:45 p.m. Homeroom: UGA Hotel, Individual Classrooms
5:00 p.m.–7:30 p.m. Institute Kickoff: UGA Hotel, Mahler Hall/Hill Atrium

Monday, June 26

7:00 a.m.–8:00 a.m. Registration: Institute Office, UGA Hotel, Room D
8:00 a.m.–11:30 a.m. Core Classes: UGA Hotel, Individual Classrooms (*Break: 9:30–10:00 a.m.*)
11:30 a.m.–12:30 p.m. Lunch: UGA Hotel, Magnolia Ballroom
12:30 p.m.–4:00 p.m. Core Classes: UGA Hotel, Individual Classrooms (*Break: 2:00–2:30 p.m.*)
1:30 p.m.–2:00 p.m. Class Advisor Meeting: Faculty/Regent Lounge, UGA Hotel, Room C
6:30 p.m.–7:30 p.m. First-Timers Reception: Foundry Bar and Mill
7:30 p.m.–9:30 p.m. Open Reception: Foundry Bar and Mill

Tuesday, June 27

8:00 a.m.–11:30 a.m. Core Classes: UGA Hotel, Individual Classrooms (*Break: 9:30–10:00 a.m.*)
9:00 a.m.–9:30 a.m. Class Advisor Meeting: Faculty/Regent Lounge, UGA Hotel, Room C
10:00 a.m.–10:30 a.m. Board of Regents Meeting: Faculty/Regent Lounge, UGA Hotel, Room C
11:30 a.m.–12:30 p.m. Lunch: UGA Hotel, Magnolia Ballroom
12:30 p.m.–2:30 p.m. Elective Classes: UGA Hotel, Individual Classrooms
2:45 p.m.–4:15 p.m. Bonus Session TBD: UGA Hotel, Masters Hall
2:45 p.m.–4:15 p.m. Association Bonus Session TBD: UGA Hotel
7:00 p.m. Class Dinners

Wednesday, June 28

8:00 a.m.–10:00 a.m. Elective Classes: UGA Hotel, Individual Classrooms
10:00 a.m.–10:30 a.m. Morning Break: UGA Hotel, Lower Lobby
10:30 a.m.–12:30 p.m. Elective Classes: UGA Hotel, Individual Classrooms
12:30 p.m.–1:00 p.m. Box Lunch: UGA Hotel, Concourse
1:00 p.m.–4:30 p.m. Core Classes: UGA Hotel, Individual Classrooms (*Break: 2:30–3:00 p.m.*)
2:00 p.m.–2:30 p.m. Class Advisor Meeting: Faculty/Regent Lounge, UGA Hotel, Room C
6:30 p.m.–10:30 p.m. Graduation Ceremony and Big Bash: UGA Hotel, Mahler Hall

Thursday, June 29

8:00 a.m.–11:30 a.m. Core Classes: UGA Hotel, Individual Classrooms (*Break: 9:30–10:00 a.m.*)
9:00 a.m.–9:30 a.m. Class Advisor Meeting: Faculty/Regent Lounge, UGA Hotel, Room C
10:00 a.m.–10:30 a.m. Board of Regents Meeting: Faculty/Regent Lounge, UGA Hotel, Room C
11:30 a.m.–12:30 p.m. Lunch: UGA Hotel Magnolia Ballroom
12:30 p.m.–4:00 p.m. Core Classes: UGA Hotel, Individual Classrooms (*Break: 2:00–2:30 p.m.*)
4:00 p.m. 2017 Southeast Institute Concludes



SOUTHEAST

2017 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

Class Advisors

Bryan Daniels

Silent Auction/Fundraising

1. _____

2. _____

3. _____

Industry Consultations

1. _____

2. _____

Scholarships

1. _____

2. _____

3. _____

Institute Kickoff

1. _____

2. _____

3. _____

First-Timers Reception

1. _____

2. _____

Big Bash

1. _____

2. _____

3. _____

Volunteer/Faculty/Staff Dinner

1. _____

Tuesday Afternoon Bonus Session

1. _____

2. _____

Lunch Roundtable Discussions

1. _____

2. _____

Association Specific Bonus Session (Optional)

1. _____

2. _____

Social Media Strategy (Optional)

1. _____

2. _____



SOUTHEAST

GEOGRAPHIC BREAKDOWN

2016 Southeast Institute
244 Attendees from 29 states and the District of Columbia

State, Number of Attendees, %

Alabama,	18,	7.38%	New Hampshire,	1,	0.41%
Arkansas,	3,	1.23%	North Carolina,	21,	8.61%
Colorado,	2,	0.82%	New Mexico,	1,	0.41%
District of Columbia,	5,	2.05%	New York	1,	0.41%
Florida,	28,	11.48%	Oklahoma,	3,	1.23%
Georgia,	47,	19.26%	Pennsylvania,	1,	0.41%
Illinois,	1,	0.41%	South Carolina,	23,	9.43%
Indiana,	2,	0.82%	South Dakota,	1,	0.41%
Kansas,	1,	0.41%	Tennessee,	24,	9.84%
Kentucky,	11,	4.51%	Texas,	12,	4.92%
Louisiana,	5,	2.05%	Vermont,	1,	0.41%
Michigan,	1,	0.41%	Virginia,	4,	1.64%
Mississippi,	19,	7.79%	West Virginia,	1,	0.41%
Missouri,	3,	1.23%	Wisconsin,	1,	0.41%
Nebraska,	2,	0.82%	Wyoming,	1,	0.41%

Top Increases since 2015:

Georgia	+10
Indiana	+2
Virginia	+2

Most attendees in 2015, Georgia with 37

Most attendees in 2016, Georgia with 47

2016 Southeast Institute Attendees



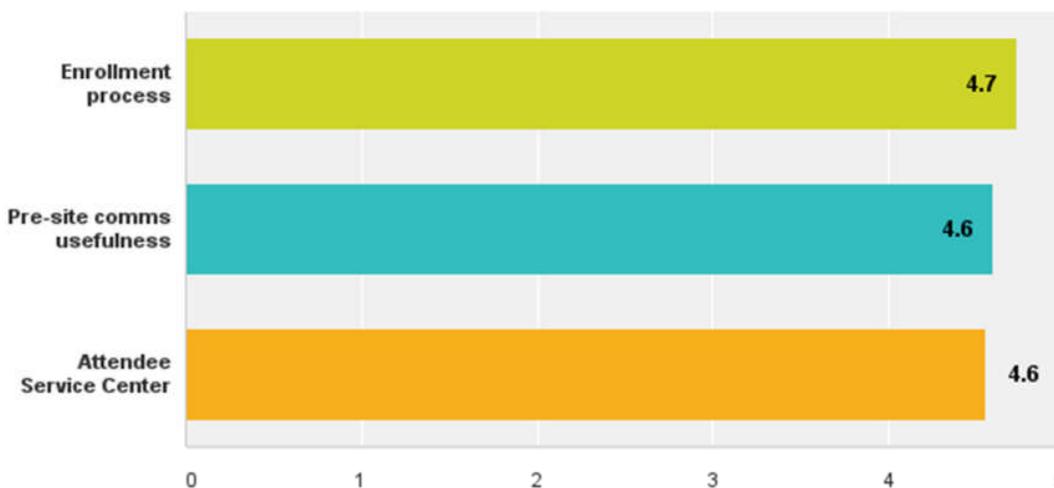


SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

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

Answered: 164 Skipped: 3



Additional comments about registration and communication*:

- I think it would have been helpful to me to see a list and description of all the courses I'd taken as I was enrolling each year so I could be a little more targeted in my approach to selection.
- I am unable to access the Attendee Roster.
- Johanna (class advisor) did a great job of telling us what we needed to know ahead of time.
- If you want to make changes prior to attending, it feels like you are having to register over again.
- I wish I had know about the Guidebook app earlier. I printed ALL the handouts and items uploaded to the attendee service center and then learned of the app where I could access the same materials digitally which I prefer.
- I think there are some opportunities with the Attendee Service Center to make it more user friendly. I tried to change an elective once and it took me much longer than necessary to figure out the process in the center.
- I think that everything was handled very well. Being a "first timer" it seemed to go smoothly. I didn't have any unanswered questions going into the week.
- I loved the Guidebook app! It made things very helpful during the week and was always easy to access!

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Very user friendly.
- A good class adviser is essential to communication prior to Institute.
- I truly appreciate the helpfulness of the registration staff! They were prompt and knowledgeable answering all of my questions.
- I never visited the Attendee Service Center onsite.
- Liz Deville, class advisor for 1-2, was great at keeping us up to date and in the loop.
- I had tried twice to change my electives; the first time, no changes "took" (could have been user error). The second time, I got a confirmation but still had to amend my electives once I got to Institute.
- It was slightly awkward to change electives being that you had to go through the entire registration process to make the changes go through. I also wasn't able to find a very user-friendly class scheduled. And, come to think of it, I couldn't find any class schedule without going into the registration...which is why I ended up changing my electives.
- The Attendee Service Center should be more integrated with our records so we can see what electives we have taken.
- Went very smoothly.
- There was a lot of communication...Some of the emails were distracting with the reply alls...
- It would be great if we had a way to easily see the classes we had previously taken. Really disappointing to end up in a class that I had already taken.
- Communications prior to institute are critical for preparing for the event. Thanks!
- Perhaps more information for attendees on proper dress attire for all functions would be useful for first-timers.
- Attendee Service Center - It would be most helpful if attendee could see previous class schedules, as well as download documents from previous years. Access to previous class schedules would help tremendously when choosing electives.
- It would be an added benefit to show the electives that were taken in previous years so you do not re take electives.
- The App and attendee service center should be synced. This would provide ease of use for those who are not as tech savvy.
- The emails prior were a bit confusing, misleading attendees to believe there would be no auction. We did not receive that confirmation until the Tuesday before, not providing enough time to gather items.
- There should be a deadline for presenters to upload presentations no later than the Friday before, so attendees can print the note taker or preferred format prior to institute.
- One of the best I have ever seen.
- It would be great if professors were required to upload their documents one week prior to the event as many of us travel etc in order to get to the event.
- Being a first year and unsure of what exactly to do, I was welcomed by multiple people as I walked in the lobby. I was very impressed!

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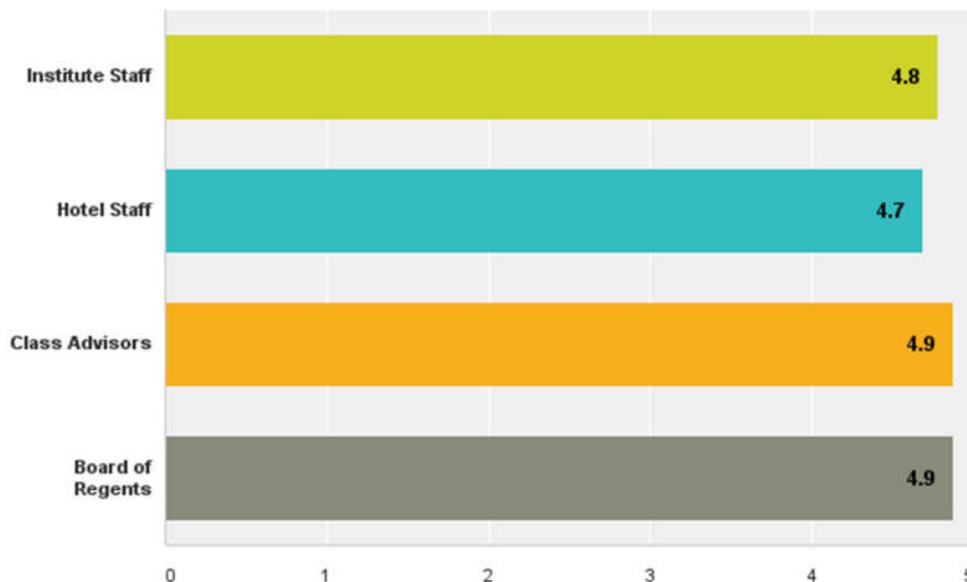
SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Useful.
- I had issues with an error continually popping up during registration. Also had to reach out to get the discount code for additional attendees. Useful information like expectations, attire, etc. for week (including after hours events) would have been helpful.
- Too much communication. The important details get lost in the flood of emails from Institute, class advisors, Board of Regents, etc.
- The class communications got a bit overwhelming at times in terms of frequency. It appears that everyone felt compelled to comment on every bit of communication so the "reply alls" became a bit daunting and distracting.
- Registration could be streamlined significantly. I'd like to be able to see all of my prior electives to be sure I don't duplicate. Changing electives requires going through the enrollment process twice. Applying a scholarship and/or group pricing is cumbersome. Instructors should have a deadline at least one week prior to institute beginning to upload handouts and all handouts should be in Powerpoint if that's how they originated. It takes way too much paper and ink to print them as PDFs when we could print them 3 or 6 slides to a page.

Q5 Customer Service

Answered: 164 Skipped: 3



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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

Additional comments about customer service*:

- During the final lunch on Friday, after the free tuition was given away for the IOM referral, there was no final message, thank you, goodbye and we look forward to seeing you next year as there had been in each of my past three years. I'm sure it was an oversight, but it struck many as a significant missed opportunity to focus on retention, something that all Chambers and associations pay close attention to. I'm happy to elaborate on this further in separate communication if you desire.
- Every one of these four would get a 10 if that was an options!
- IOM has an incredible group of people committed to making the experience exceptional! Way to go!
- Our Advisor was Amazing...Class 3-2.
- The Institute staff was incredibly helpful the whole way through. From early questions about the program and what to expect, to assistance with registration and on site questions, they really are fantastic. The volunteers were fantastic too. It's wonderful to see such passion and dedication to a program post-graduation. Very inspiring!
- We are professionals yet do not get treated as such at times at Institute. Sometimes they forget we pay for these classes, not the other way around.
- All great.
- Everyone showed southern hospitality. It was great.
- The Board of Regents went above and beyond to make our experience memorable. I was so thankful to have met and learned from so many while there!
- The faculty and staff selection could not have been more on point. I learned a ton of incredibly valuable information. Thank you for this amazing opportunity! Can't wait to go back next year!
- I didn't have much interaction with the Board of Regents.
- Johanna McWilliams, advisor for 1-3, was excellent!
- I didn't much experience with the Board of Regents hence the neutral score.
- The UGA staff were phenomenal. Hands down.
- Everyone is awesome!
- The Institute Staff was rude in a few instances. I would have been fired for treating my members like they treated some attendees.
- I feel like the IOM staff treat many of the attendees as a nuisance.
- I think it's great that the Board of Regents are accessible to all attendees.
- Beth was a very helpful and attentive class adviser. Thank you Beth!
- Pam did a great job as our class advisor!
- Henry is AWESOME!
- Beth Morrison was an AMAZING advisor!

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- The Courtyard by Marriott did not seem prepared for a group of our size to be staying there. Accommodations were not the greatest and the bus driver to and from was certainly not prepared to be driving that bus!
- Everyone was extremely helpful! Thank you.
- Great Job!
- Kim Dahlsten was the best class advisor. Our class is as close as we are because of her. Justin Patton and Sam Erkonen are the two very best instructors at SE Institute. I also really enjoyed Jaimie Francis. Frank Kenny should not be invited back. He added absolutely no value to my learning experience.
- Liz Deville was exceptional with her communications and wonderful to work with.
- It was our last year of Institute, and it seemed more unorganized than usual. Certificates were misprinted or placed in the holders upside down. Karaoke was chaos and didn't allow time for our class to even sing one song. We arrived an hour and a half before close, immediately requested a song, and watched our name creep closer on the screen then disappear to learn our slot was purchased by another class. Then, when we inquired, the Institute staff responded harshly, "We close at nine thirty. I'm sure there's somewhere in Athens you can sing Karaoke."
- Hotel staff was great and accommodating to our class meetings in the lobby.
- Pammie was great for a first time advisor, but we have found it strange none of our prior advisors have ever been asked back.
- Class Advisor lacked personality. Could not control class, did not bring excitement.
- Words just can't describe how wonderful this school is.
- Faculty, staff, and hotel personnel all do a wonderful job in assisting and creating a great environment.
- Breakfast options in hotel were small and took long to order and pay.
- Most of the speakers were fantastic. However, I know most of the my class and 2-1 had a lot of issues understanding the material from the Marketing Strategies class with Chakisse Newton. While she was very knowledgeable in her field, most of the class was not understanding the value propositions portion and she flat out refused to give examples and stated multiple times that material would have to be skipped due to time constraints. While we are only in class a few hours, I do not believe spending 5 minutes to tell/ask the class which material we should skip is an effective use of class.
- Pammie Jimmer was a great class advisor.
- This is a top-notch process that has been refined to excellence. Once you are on-site you are greeted, appreciated, engaged and fulfilled. Everyone is knowledgeable, friendly and enthusiastic to help in any way. The hotel and conference staff were fantastic too. I have difficult dietary constraints and the catering staff were all very kind in making sure I got a meal that I could eat. That may seem insignificant to some, but when you're hungry you can't focus. I've grown accustomed to taking food with me most places, but they were patient and accommodated me at every meal without making me feel like I was bothersome.
- Hotel staff does a great job.

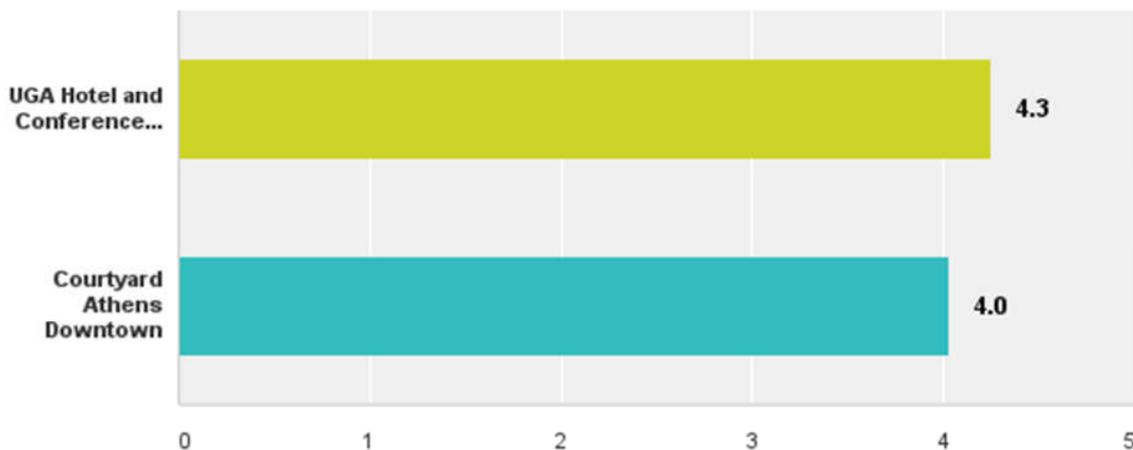
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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q8 How would you rate your accommodations?

Answered: 151 Skipped: 16



Additional comments about accommodations*:

- I rate the UGA a 5 because it is the host hotel, has wonderful and well trained staff and is well kept. They are due for an update though. The bathrooms are far too small for the price point they are seeking. If I were a large person, I would have to use an ADA compliant room.
- Nice that everything was right there. Wish they had a workout room.
- There was a huge roach in the bathroom. Other than that, everything was ok.
- Loved the convenience.
- I was in the Marriott last year. So much better being in the Conference Hotel.
- The hotel could use a renovation, but you can't beat the proximity or convenience!
- The UGA hotel is pretty run down, the rooms are tiny and the amenities are poor. For \$120+, we should at least have both shampoo AND conditioner. This isn't a 'budget rate' billed hotel, but a full service hotel. For the price, I realize you pay for convenience, but they really need to improve the rooms. The gym in the fitness center was tiny and there were no free weights at all, so no ability to work out besides cardio. For the price, I would expect a bit more. However, the front desk and bell staff were friendly, helpful and courteous.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- The rooms are really small and cramped. My room had a weird smell and I could hear everything the person next door to me was doing.
- I've stayed at nicer Courtyards, but it was clean and serviceable. The location was fine. I will probably elect to stay at the Holiday Inn next year.
- The UGA center oversold and I was bumped out of my initial reservation (that was made a year prior). While I was upgraded, I was unable to check in until after 6 on Sunday because they did not realize their error until then.
- The Courtyard was not as nice as I imagined. A few front desk staff members did not have good customer service. The room was dirty and low amenities.
- UGA is so convenient but just okay.
- It was wonderful, close to campus, walkable to many things (such as my class dinner) and I felt very safe and secure. The staff was friendly and accommodating.
- Very helpful staff at UGA Conference Center.
- Will want to stay at UGA or Courtyard next year for convenience.
- We had one of the older rooms with two beds and it was very tight quarters. It made it a little challenging for two people to share a room and get ready in the morning.
- A group of us stayed there and it was fine. I would equate it to the Courtyard (where I stayed last year).
- The rooms are just tiny. It is convenient to have all of our classes and events in one conference center.
- This year I paid a little extra to get the full sized beds. Much better. The dorm-sized beds from last year just didn't work for me.
- Rooms were not very clean, but you can't beat the convenience.
- Roach in my bed and rooms are always TOO COLD.
- The staff at the Courtyard Athens was very helpful and friendly. They were always smiling!
- Very very small room!
- My room was moved three times due to faulty AC units, the dish network was always out and the staff was not very helpful.
- Perfect. No issues.
- The rooms were very small, old and the noise was not muffled at all from the hallway. I would like to see the conference moved to downtown Atlanta. We need to be in walking distance of restaurants and shops for down time.
- They are very professional!
- It would be nice to have the shuttle run to the Holiday Inn Express especially since it runs to the Courtyard which is across the street. Please consider this for next year.
- The rooms were a little dirty: Bugs in rooms and mold in bathroom.
- I stated off campus last year and the hotel was very nice but it made a huge difference being able to just go upstairs to my room. I really liked the UGA Hotel.

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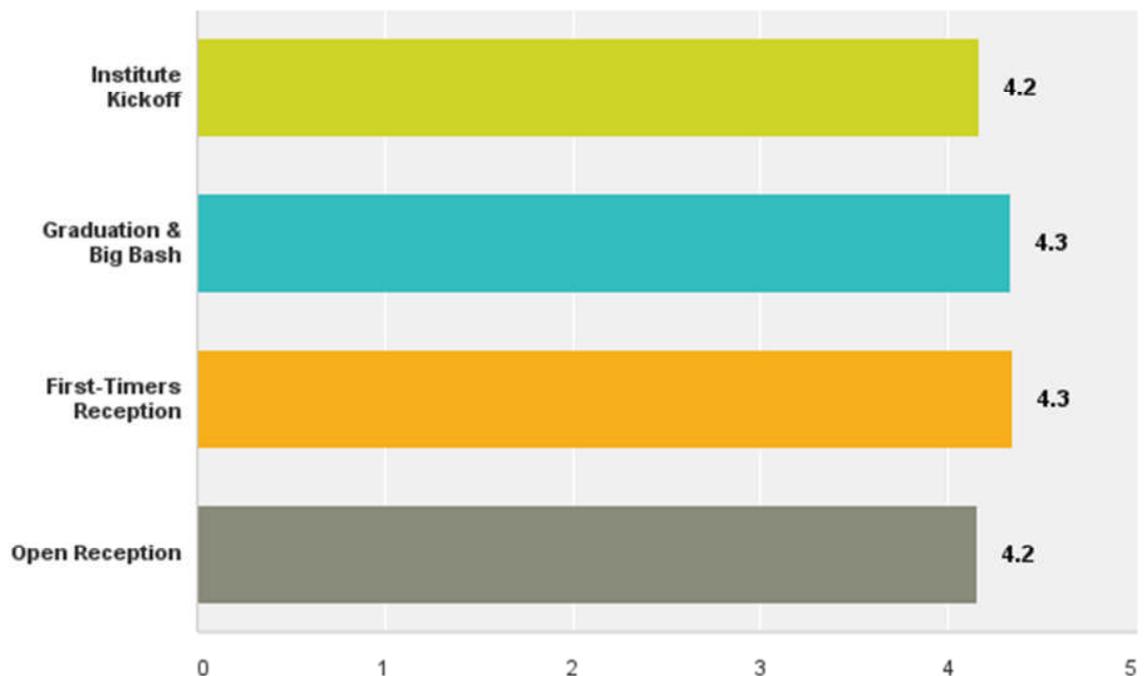
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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Convenience is the only reason I stay at the UGA hotel. It is in major need of an update in the rooms themselves. Also, there needs to be a curfew of sorts for persons having 'parties' in their rooms at night.
- Ask them to advertise or post the hours of their restaurant and bar. And the pantry. Did not know they had a pantry last year.
- Other than the rooms smelling a bit musty the air conditioning worked very good and the water was hot!
- Free Breakfast!
- UGA wouldn't let us make reservations for the next year so that was a disappointment.

Q10 Please rate your experience at the following Institute events.

Answered: 164 Skipped: 3



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ATTENDEE SURVEY RESULTS AND FEEDBACK

Additional comments about Institute events*:

- One small addition that could be made is to record the receptions, kickoff and graduation with GoPro's or something similar. As a graduate this year, I think you missed an opportunity to capitalize on some of the speeches given to use as marketing and recruitment tools for Institute. Again, happy to discuss this further.
- I wasn't a big fan of the ice breaker for the kick off. For returning students it was a little disappointing that we didn't have much time to spend together before we had to split up into other groups. However, it was nice getting to meet individuals from the other classes. Perhaps that could be something that takes during one of the receptions?
- The ice breaker was very awkward and did not make sense with respect to bonding with our own class.
- My biggest gripe was that at all of the speaking portions of the program, it was pretty much ALL white men. The IOM community is diverse and those speaking on behalf of the program should also be diverse. I also found a few remarks from one of the graduation speeches to be sexist. "There's even someone here PREGNANT!" like that is a crazy thing.
- The food and drink could be better - no healthy options, and the wine was barely drinkable, and the beer was cheap. I thought the receptions could have been raised up a notch and provide more options for those trying to be conscious of what they're eating.
- I thought the kickoff was somewhat pointless. I think more could be done to make it worthwhile to come in on a Sunday and get the conference going.
- As for the Big Bash, I thought the timing was poor. Our schedule said graduation was at 6:30 but it didn't start until almost 7:30. We didn't eat dinner until 8:30, so people were starving. It could be more accurately planned out to make it more enjoyable for participants.
- Instead of having a short day during the middle of the week I would rather get out earlier in Thursday to be able to get an earlier flight out. Makes for a super super long day.
- Athens speaker was ineffective. Perhaps distribute an Athens souvenir and a welcome on behalf of the city would be sufficient.
- Lengthy intro of advisors is irrelevant as there is little to no interaction with class advisors other than your own.
- Graduation ran very smoothly. Open bar before event was well-received.
- Did not care for the ice breaker game/kickoff.
- Enjoyed reception food stations/kickoff.
- Unexpected closing of Foundry Bar & Mill.
- I think classes should be required to sit together at the Institute Kickoff. As a first year, I felt uncomfortable not knowing anyone on the first day and wasn't sure where to sit.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- This kickoff was the epitome of a good idea that was not thought out. Attempting to move that many people into different sections of an auditorium was unrealistic at best. It cheapened the entire kickoff and made for confusion and annoyance. The rock paper scissors competition the next day at lunch did the same. I would have preferred time to network with my class as opposed to being forced to sit with people you met one time to watch a game.
- I could take or leave the event at the foundry. I don't karaoke, so it's not overly fun for me to attend. It's just eh to me. I'd rather go back to my room and catch up on missed work while I'm away from my office.
- The Foundry didn't seem that excited to have us there. Bartenders seemed annoyed and they only accepted cash. Event ended early and for those classes that grabbed dinner it was a waste of time to go.
- Food choice should be different at the Graduation.
- I loved the feeling of inclusion that the Board and staff all exuded while at each activity. Each event was fun and inviting!
- The food during the Big Bash was sub-par.
- Too many people for the 25 group exercise at kickoff.
- Everything was wonderful. Thank you for doing such an awesome job putting everything together! I had the best week of my life...seriously!
- Open Reception was crowded. If they had let people go upstairs it would have helped some of that problem.
- The salads should've been preset at the Graduation Ceremony and dinner served shortly after being seated. This probably would've kept more people from leaving the celebration so quickly.
- First-Timers reception was such a great facility. Very cool place.
- Graduation Bash was nice, yet very much geared towards senior class in terms of the after-party. I would have served dinner more soon and quickly or had salads on the table so others could leave more soon for other plans. Since there isn't much mingling between classes, it's hard for an event to bring people together such as this hence why people leave so quickly.
- I felt like a lot of people left the Big Bash soon after the Graduation. Maybe have something else going on other than a DJ to keep people there or perhaps forego the DJ all together.
- The Foundry seemed a little "dry" this year.
- Thank for adding additional bars and food stations to the kick-off reception--that was lovely! I enjoyed the meal at the Big Bash as well.
- I really enjoyed the first timers reception. It gave all of the first years a wonderful chance to network and meet other first years outside of our class.
- While I understand the idea behind it, the kick off ice breaker that drug on into lunch the first day was just no good.
- Music would have been nice at Big Bash.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- I didn't go to the open reception because it was too late for me to want to be out. The Graduation was nice, but it took an inordinate amount of time for us to get our food. Most of the tables had been served but for some reason a few of us had to wait another 15-20min for our salads to come out.
- The graduation wasn't special and was poorly timed with food. I know there were 2 classes, but I think you should consider bringing back the videos and having the meal better planned.
- Kickoff icebreakers are always pretty awkward and not super useful.
- Healthier food options would be great for those of us that don't have a food allergy and aren't necessarily gluten free, but prefer foods that are not fried. The open reception was cut short this year for those of us not attending as a first-timer.
- Did not enjoy Kickoff ice breaker - should allow us to stay with class as we just got back together before that event. Was disappointed that the bar closed down after karaoke - last year they played music and allowed us to dance.
- Really disappointed that graduating classes were unable to do videos.
- Kickoff was good but the mixer was highly complicated and involved too much movement. Leave people with their class as that is the primary relationships that need to be fostered.
- I felt like we should have been served our food prior to the ceremony. After it was over we still had to wait a long time to be served and were all starved. Also, the only option of dressing on our table was bleu cheese, which most people didn't like. I did like the fact that the choice was a "southern" staple. That's a cute detail.
- The food at the graduation was not good.
- The meals are not great.
- It would be nice to have a mentoring program setup for first years and fourth years to help those that haven't attending before.
- The icebreaker activity at Kickoff was kind of a bust. Great idea in theory, but it just didn't work with such a large group.
- Not crazy about the menu choice.
- I did not care for the ice breaker activity at the kick off event.
- The trivia was confusing with more than one possible answer and little guidance.
- Graduation food was better than normal.
- Reception and Karaoke seemed more chaotic.
- I thought that they was not very well prepared for the Graduation Ceremony. There was several tables that was very late on getting their food.
- Food really needs an upgrade. Big Bash dinner was awful.
- Kickoff Game wasn't great. Food came out much later than anticipated at the Graduation Ceremony. Open Reception - okay, but the servers were rude and lacking.
- Graduation Ceremony began an hour later than anticipated. We would have appreciated food from the beginning - at least the salad - since it was so late when we got to eat.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- It would be great if the Foundry/Open Reception could be open longer. Closing at 9:30 is early especially when everyone is having a blast.
- Everything about the Gala was fine - music, etc., except the main meal. The chicken itself was not good and it was lukewarm to cold when it arrived. Collards and mashed potatoes are inappropriate for a gala. The shrimp and grits from the year before would have been a better option. Or try to give people a choice between steak and seafood. (Am also not a fan of pecan pie, so the dinner totally struck out with me) .
- Food was odd at first timer reception and due to electricity going out they refused to serve drinks for almost an hour then finally agreed on cash basis.
- As a third year attendee, I did not care for the group activity during the Kick-off. I would have preferred allowing time to reunite and get acquainted with my fellow classmates.
- I know we had attending The Foundry last year for my first year reception (and I am assuming prior years too?) and we went there again this year. I found it hard to want to stay there this year due to there only being 2 bartenders and that they were rude. I understand there was a power failure due to the storm but I thought it could have been handled differently.
- Icebreaker game was long and confusing.
- Making the first class on /Sunday is rough if one has travel delays. I would recommend to students that they fly in a day early to avoid missing the homeroom experience.
- The Institute kickoff seemed to be unorganized with the game and could have moved a lot faster if numbers were already around the room. If the idea was to network with other classes it wasnt very effective as the time allowed didnt allow for that.
- The open reception had some issues simply because they lost power, I think. That may have made the bartenders a little grumpy. Our class didn't get to sing at all because another class offered the DJ tips to put their songs first... I don't think the other class was trying to slight us; it just worked out that way. Can't blame the DJ for wanting extra tips!
- I would suggest that you offer more cocktail rounds for the first night - there a so many people.
- The Institute kick-off food isn't good. It always tastes like they prepare it far in advance and then let it dry up under warming lamps.

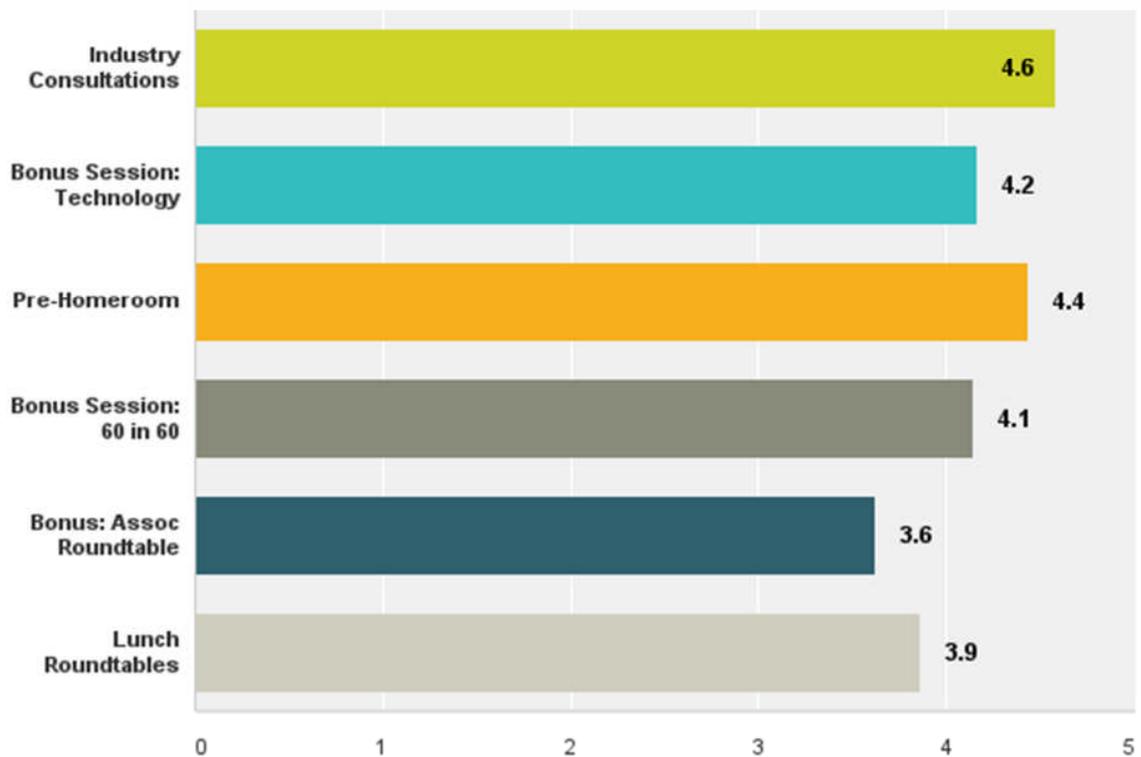
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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q12 Please rate your experience participating in additional learning opportunities.

Answered: 163 Skipped: 4



Additional comments about learning opportunities*:

- I like the idea of the lunch roundtables, but it struggled a bit in its first year IMO. I'm sure it will get better each year though.
- 60 in 60 is always great.
- Consultations for me have always been great but many of my classmates dealt with challenges including extremely delayed responses which limited or excluded their ability to participate at the tail-end of the week.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- On the 60 Ideas session...It would be great if someone could capture all of the ideas and who shared them. I took fast and furious notes but didn't always catch who said what in order to follow up. Or, have everyone sign in so that we have a group we can follow up with on ideas. This is a great session!
- Wish the association roundtable had been more efficient for problem solving and benchmarking. Since location is low on association attendance, maybe a meet and greet for 30 mins on the first day would get basic introductions out of the way and allow the group to discuss real issues. Know it was a first time deal, so just a thought for going forward.
- Wish the table topics at lunch had been available for all. Didn't learn much at the 60 ideas session but others said they did so it's all relative. Still was interesting to hear.
- I wasn't crazy about the lunch seating when we were assigned to our group from opening night - it was too confusing.
- 60 Ideas in 60 minutes - believe only 45 minutes was allotted.
- Somehow, I was unaware of the Bonus session. Then again, I had a death in my family just a week prior, so needless to say, I was pulled "off course" just prior to coming to Institute.
- 60 Ideas in 60 Minutes is always a good one!
- The bonus association roundtable was poorly structured. The whole time was spent introducing ourselves and we barely got around the room. It would have been better to just introduce ourselves with name and company and one fun fact, but it got way in the weeds of individuals companies and situations. I would have liked to see an interactive program and find out what topics we were all interested in and determine from there what to discuss. The bulk of the time was spent with 2-3 people discussing their very specific personal situations, which wasn't helpful. I would like to see 2 association sessions - one during the first day as a quick "get to know the other association people at the conference" so you can meet first (short time frame - more as a quick meet & greet). Then a longer session talking about issues and challenges and association related topics in a later "bonus" session.
- Thank you for opportunities.
- The association roundtable wasn't very effective. We just went around the room and introduced ourselves and told a little about our organizations. There weren't many people in the room and several of them were from chambers. Unfortunately I did not take away any benefits from this session.
- I don't take advantage of them because I need to better use my time but I appreciate the fact that they are offered.
- We should have time during the class day to do a idea sharing roundtable with our classmates to address issues we are having at our Chambers. This could be a facilitated roundtable as a part of the core classes.
- With so much information being given to us during sessions, it would be nice to have lunches that are more relaxed, rather than having roundtable discussions. Maybe give participants a choice as to sit at a table with a topic for discussion or not.
- 60 ideas- people should have a time limit to share.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I really enjoyed 60 ideas in 60 minutes. Hearing from different people on the same topics was very helpful ... and inspiring.
- I did not partake in any of the lunch roundtables or bonus sessions. For me, there's a point when I reach information overload, and I need time to process and build relationships.
- Our lunch round table didn't seem to have a leader. We had some OK conversation, but it didn't seem like anyone at the table was particularly knowledgeable about the topic.
- Lunch round tables were too much. We need time to take a mental break and/or do some work.
- I need to take advantage of the Industry Consultations next year. I know I'm missing out on valuable one on one time.
- The lunch round table topics would have been helpful to know in advance of lunch, even if right before lunch so I could make a decision of what topic would be helpful. I would also recommend better signage on the tables for the topics. I think we had more tables than ever and walking around with your hands full with lunch and figure out which table you could sit at for the topic was too much, so I just sat at an open table and missed out on that opportunity.
- The Association Roundtable was not good - took the full time to just do introductions. Will not participate in that session again.
- Association Roundtable would have been better if it had been more than just introductions. Use the 60-idea in 60 minutes format or something different. Propose 5 topics to discuss and let the group roundtable.
- As a fourth year, it was a total Institute buzz kill ending the experience by combing with the other class.
- I requested a consultation on Monday. Received a text on Tuesday, which I immediately responded to, text on Wednesday, and text twice on Thursday, finally receiving a call at lunch to follow up after institute. Lucky for me, my classmates were also willing to talk through our issues.
- As for the roundtables, I didn't have the chance to participate since most of our class discussions (Labor Laws, Events, Board issues, etc.) carried over into lunch, dinner, break, etc.
- Did not participate in lunch activities due to food quality.
- Wonderful school but would like even more relatable information.
- Always learn from others so the 60 in 60 was great. Lunch topics were not needed, could have been a good time to visit and get to know others without forced topics.
- The moderator at our lunch round table was extremely interested in describing her work in diversity with her Chamber. She never really engaged the table. I would not recommend her as a moderator in the future for such an important topic.
- Love the 60 in 60, have taken great ideas away from that both years! The lunch roundtables on first day didn't have a leader at the table or discussion questions, so might be more effective if there was a table leader.
- I love the lunch roundtables! I attended a women in business roundtable and got lots of ideas for my upcoming 2-day conference!
- Very difficult to hear over adjacent table conversation, but I felt there was good information in having the lunch roundtables.

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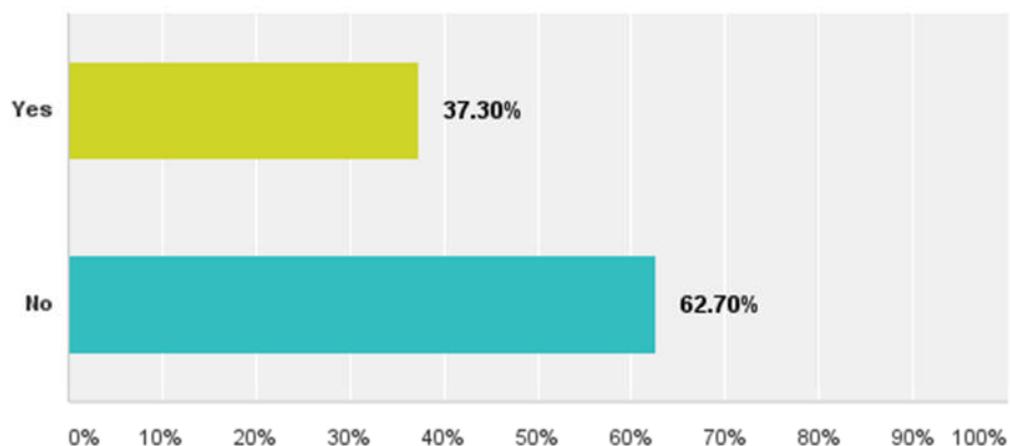


SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

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

Answered: 126 Skipped: 41



Additional comments about the silent auction*:

- I like the idea and have used it in prior years. I didn't bid this year because I didn't see anything in particular I wanted.
- Great system!
- I don't enjoy bidding online.. For me, It is more fun to actually walk around and physically see bids by the items. For some reason, the online bidding never seems to work for me and I get frustrated.
- Not easy to carry items home on airplane. Did not bid on anything.
- I had trouble getting Bidr to work for me, but liked the idea of being about to bid electronically a lot.
- Could NOT get the Bidr up and going so I did not participate.
- The auction is fun, the items are great, and I enjoy giving back to the Institute scholarship fund through the auction.
- Was not able to use the mobile app perhaps due to my phone carrier ... better auction room this year to see items.
- I was broke this year. I was in the midst of planning a move and separating from my husband. So needless to say, money is tight at the moment. Next year however, I plan to participate!
- Offer shipping services - I would have bid!

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Difficult to see the items.
- Personally, I like to be able to see everything in person. I did look at the stuff online before I went to go see it in person though. That was nice.
- I personally had a lot of trouble with Bidr. I was finally able to troubleshoot it last year, but this year it was equally as hard, if not more so. I would suggest having the old standby of paper auctions available just in case and give people the option of both online AND electronic bidding (maybe a BIG sign with the disclaimer that electronic bids MAY trump paper bids or maybe someone could write in the top e-Bid on affected item sheets at end of day?). For me, I bought and bid on NOTHING this year b/c it was just so time-consuming to get the tech to work. I also don't remember if there were values on anything that were terribly visible? I'd have loved to have the option to swoop into the auction room to bid on paper; I may or may not have won but it would have made me participate.
- Getting set up with Bidr was kind of a pain, but once it was working, it worked well.
- There was no time to go to the silent auction. You should consider putting it in a more convenient location.
- Great software.
- I like the excitement created when you have to come into the room to bid. The online portal did not work for me and I got frustrated.
- The "convenience of being able to bid away from the physical auction" DECREASED my rate of bidding, as well as took the fun out of bidding.
- Again, would have provided items had we known sooner.
- I thought that was a great idea to set it up like that.
- Please place a specific time on when it ends - after the break doesn't give an exact time for those bidding.
- Heard a lot of issues with the connectivity in regards to the particular location of auction room.
- There were some glitches signing up, so I didn't try to bid. But our class did buy a number of items for our Adviser and we contributed nearly \$1,000 worth of goods.
- I have participated in previous years.
- It was a little intimidating at first, but once I got the hang of it, it made bidding LOTS easier! (And winning too!).
- There were so many great packages... but for those of us that fly in / out, it is a challenge...

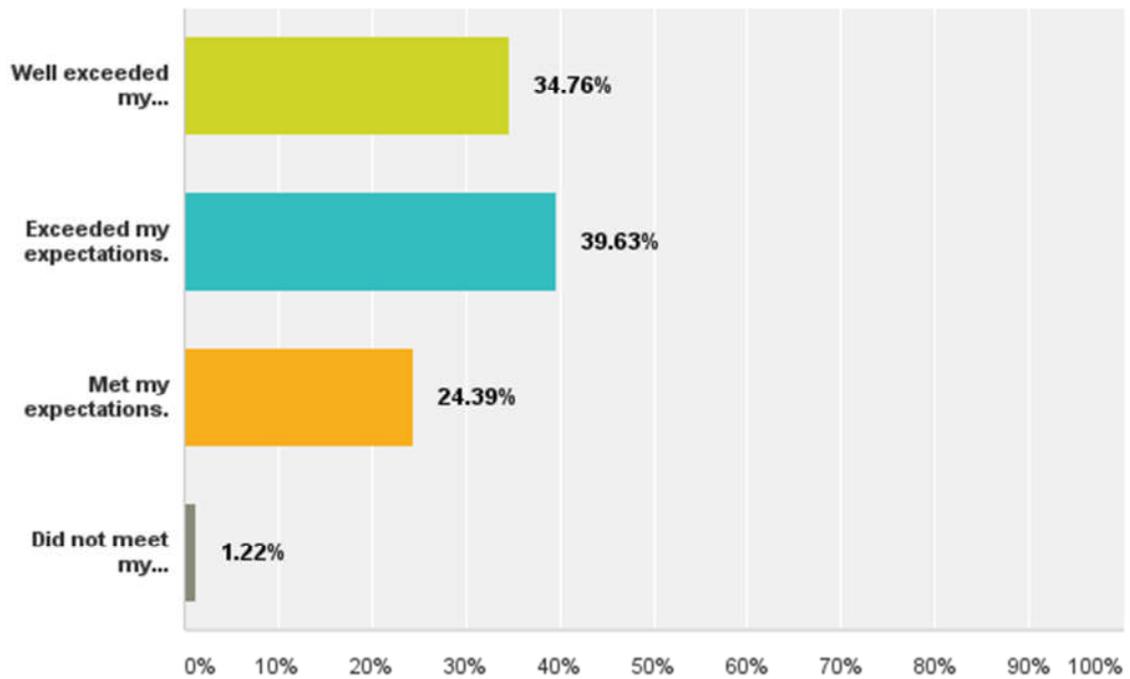
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ATTENDEE SURVEY RESULTS AND FEEDBACK

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

Answered: 164 Skipped: 3



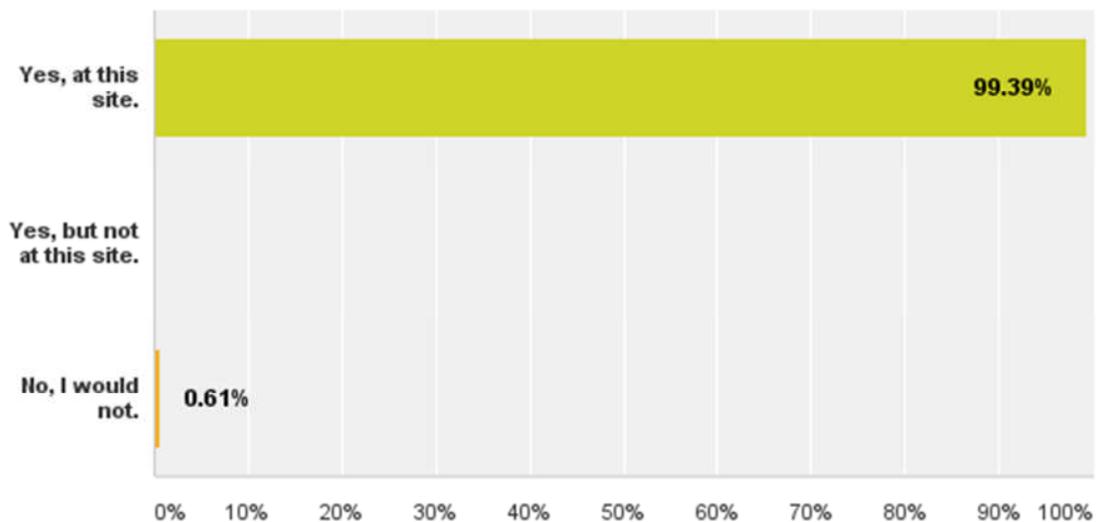
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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q23 Would you recommend Institute to other nonprofit professionals?

Answered: 164 Skipped: 3



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

- 1. Tips and tools for working smarter. 2. Marketing - how to best promote; communication messages that convey benefit and depth of a Chamber's community/business impact 3. Competing with other associations in your area (BNI, etc...).
- New Department of labor rulings ie: overtime rules.
- I think it would be helpful to have levels for some of the classes (especially electives). It is hard to present material to someone who has many years experience and someone who is new to nonprofit management in the same arena.
- Accreditation process as an elective.
- Chamber of Commerce Foundations.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- I think the final 4.1 & 4.2 combined class was a challenge. I'd recommend not combining the classes or doing so earlier in the four years for a meet and greet in case they combine, etc. It was a great idea but didn't add much value so close to the end of the week. If the board chair's class could be come more of a facilitation session where we can decide hot topics or scenarios to discuss and then have class discussion, that would be wonderful!
- Board and staff retreat how to's; Chairman/CEO relationship building.
- Fundraising and sponsorships, higher level legal issues, not just the basic ones that were covered so quickly, Event management.
- More human resource classes.
- Please have a bonus session or elective for Chamber communications/marketing professionals. The classes were educational, but rarely were relevant to my day-today. Would love to hear from others with similar roles about best communication practices in Chambers.
- I would like a more in depth legal class. Maybe a class that would teach different types of org/staffing structures and how to build capacity.
- I started Institute many moons ago and first year was very helpful to me as a newer executive. Life intervened, but I was able to come back last year. After 13 in the industry, however, I now feel I could teach the classes. I am not the typical institute student, however, and I acknowledge its value to newer execs (and I always take away something valuable).
- A focused "track" i.e. Membership, Events, Financials, etc. might allow for more brainstorming and sharing of best practices.
- I would like to learn more about generations in the workplace and technology/social media in communications.
- Crisis communications.
- I understand that this is a chamber program, but being from an association I was definitely in the minority. Many of the chamber examples of small budgets, small staff, dues structures, local focus etc. didn't apply to me since I'm from a national association. The Northeast Institute has more association attendees but the Southeast Institute was a great experience and a great group of people.
- My first year offered very good info. I enjoyed this year but wasn't blown away by the content.
- You professors are good, but some have been out of the industry for a long time. I think the content should be more relevant. Financial classes and governance classes are outstanding. First year was great, second year info wasn't, 3rd year was better, but there was still some content that while the teachers were entertaining, it wasn't as tangible or applicable as others. It would also be great to have classes or electives focused on 990s, marketing tools for small chambers, benchmarking against US Chamber or ACCE standards, etc.
- I think not being an Executive Director hurt my experience. I really wanted to learn about budgets and best practices for budgets but the Financial Fitness class seemed to be a little too advanced for someone like myself. So maybe a class that was a little easier to follow.
- Also, more classes or more in-depth classes like the Communication with Confidence class. I have sold 3 membership since being back just because of Justin's "performance."

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Possibly more emphasis on Non Dues Revenue.
- My class on hiring/firing was lacking in my opinion, as a new ED I was looking forward to learning more in this area. I would like to have excelled more here. Also Finance was taught as my very last class of the week with a faculty staff who seemed a bit exhausted, therefore it was difficult to learn much there. Everything else was off the charts! Exceeded expectations! Went above and beyond!
- This year's classes were not as challenging as I'd have liked. The instructors were great but the content was lacking.
- By 3rd year the electives should be 'meatier'.
- Overall I really like the curriculum, and with the electives, I feel like it is well-rounded.
- More legal, financial information, and a session to share best practices on topics.
- More strategic planning.
- Presentations of how to use MailChimp and other useful online tools.
- A class on Chambermaster would be great.
- I'm sure there will be lots of topics in the coming years for me.
- Information that would be beneficial for smaller Chambers. Even though the information provided was very valuable, the smaller Chambers have different issues that larger Chambers typically don't have.
- Budgeting.
- There was a lot of duplication in material at this site. Specifically two instructors basically gave the same class even though the topics were very different.
- The electives on Sponsorship Solicitation and Communicating through Media could easily be 4 hour classes, especially the media (with examples and group work on drafting press responses).
- I think the variety of topics is very good.
- Consider paying more attention to the subject matter and not just the titles of the classes. Most of the classes were really good, but we had 3 classes almost back, to back, to back, that talked about the same information. Don't get me wrong, the instructors and classes were all (mostly) great, but if they are repeating what the instructor said before them, it's not super helpful.
- I only felt 3 of my courses this year were actually very helpful. I would like a more detailed description of exactly what will be covered so I can maybe make better choices on what to take next year. For example, volunteer management only covered board management, and I thought that was strange. If every course was like a Bob Harris course, we would be in good shape. He always has highly useful information with relevant handouts and resources. It would also be nice if there was a 101 and 201 course for everything...so depending on what you already know and feel comfortable with, you would either take the 101 or more advanced course. I just felt like most of the courses this year were redundant from prior courses, or too general/common sense.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Event management, membership, more roundtable discussions. Offer basic vs enhanced classes- some classes were just outlines- not enough time to delve into some topics- so those very new in the industry would need more basic classes vs those that have years in already... Also CEO training would be good option- hints and basics- create more opportunities for additional electives- some of us don't like to go to bars- but wanted more interaction.
- Strategic planning.
- The difference in the Chief Staff Executive being the Executive Director vs. President/CEO. Pros/Cons of same.
- Relationship between Board of Directors and Executive Directors/President, CEO's - More distinct outlines and job descriptions of these roles and their relationship together. Strategies and information to take back to a Board of Directors to be able to hold a Board Orientation class, so everyone knows their roles and how to treat their Executive Director, President/CEO.
- It is interesting to me that we are supposed to be business leaders but none of the classes teach about business trends (instead of nonprofit trends). Also, many classes teach more broad topics, it would be nice to have more "how-to" classes. For example, how to build a legislative agenda, how to create a bonus based membership sales position, how to structure membership dues, etc.
- More in depth classes not so basic 101 classes. Remember you are dealing with non-profit professionals not college students or people who know nothing about the industry. A lot of the classes were very broad, general and basic.
- If there is a way to elect to have a longer or part 2 of a session of particular interest. i.e., for me, would have loved more of Guide to Governance.
- Sales structures.
- Budget Writing 101.
- A one hour quickbooks course would be awesome since they are so expensive otherwise - elective course!
- The U.S Chamber continuously tells us Government Affairs is important; however, they never walk us through creating Grassroots and grass tops systems, or surveying for a legislative agenda, etc.
- In order for our IOM to stay up-to-date and relevant, our class proposed the idea of continuing ed classes on current issues and topics for all IOM alumni.
- This (year three) was the first year I felt truly challenged - and I loved it! I do also think that there needs to be a 'hot topic' session or two - the new overtime laws would have been a great one.
- Marketing, more ideas for the Ambassador program, budgeting.
- Is there a class or curriculum that is geared to what is trending in the chamber world? Also, when is it conducive to change to what is trending? I.E. tiered dues, use of titles, etc.
- Volunteer management (not Board management) i.e. how to manage and grow a group of community volunteers for event support, etc.
- More on overall demographic trends. More on economic development. More on urban planning.
- The Large Chamber Experience: How to keep your small and medium sized businesses engaged.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- More time is need on financials, in my opinion.
- This is really a side note to Finance first year. It is a rushed class and I think it would be better broken into two separate courses based on the level of finance you are interested in. Meaning those who work with the numbers on a daily basis would benefit from the course that was taught and then those of us who just want to understand the importance of how we get to the bottom line (sort of finance for dummies). I felt like I would have gotten more out of the class had it been taught at a lower level since there are those of us who need to understand a budget, but not work the actual numbers. I hope this makes sense.
- How to develop and deploy a membership campaign.
- How to convey value through benefit kits, one-sheets, promotional activities, etc.
- Best practices in monthly networking events: breakfast, lunch and after-hours.
- The Chamber role in workforce development; how to be a relevant partner and regional best-practices.
- We focused a lot on social media marketing; and it was helpful, but a lot of our classes overlapped. Sometimes we even got a little bit of mixed messaging. TRAINING (as opposed to lecture/educational) classes are great, where we take a concept that we can take back to our chamber and work through it as a group.
- Need to offer higher level courses for those with some experience. All courses were at a very basic level.
- Diversity and Inclusion.
- I think the ACCE Horizons 2025 is a great tool and was only mentioned in one class. I feel it is something that can be worked with vs. reading and putting on a shelf. We used the information for our recent Strategic Planning session and it helped me educate my board on the direction we needed to pursue to be more relevant.
- I loved the budget and strategic planning classes. I must admit, the ""Innovate or Die"" class didn't really work for me.

Additional comments about Institute*:

- This year left something to be desired when measured against prior years. I understand that Institute is endeavoring to be more professional and some traditions of past years don't fit that mission. But I would challenge those who plan and strategize for IOM to reach out and gather feedback beyond this survey instrument. As a graduating class this year, there were several opportunities where we felt we were put on the back burner as it were. The final lunch is a good example of that. Another is the omission of the hospitality room. As someone who didn't drink my first two years of institute, I found that to be a fantastic place to network. I convinced nearly all my classmates to switch to the UGA hotel for our senior year and it was gone. I don't pretend to know all the details and motivations behind the decisions to put on such a wonderful event each year, but I felt there were some touch points that were lacking. This is not meant to be critical, but

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

a point of view shared by many in the 3rd and 4th year classes. I look forward to helping continue this great learning opportunity and tradition in any way I can!"

- 1. I'd love a database of Chambers/attendees by size so that we can connect and share ideas that are more applicable to our size. 2. I work with IOM graduates who would LOVE IOM post-graduate continuing education. Perhaps a course every 5 years. 3. The option for expert advice during breaks/lunch is fantastic! In addition, I'd love to throw out a topic I need guidance on and then receive 3-4 referrals on those who would be great resources.
- Executive Finance needs to be a 4th year course.
- It was an awesome, tiring, fulfilling and completely engaging week--thank you so much. I've already started implementing several processes and events and can't wait to do more!
- I absolutely love getting to attend IOM - in large part due to the connections I've been able to make and maintain throughout the year! Being able to depend on classmates, advisors, faculty and staff for insight & assistance whenever needed can't be understated!
- Food provided at lunch was not great.
- I love Institute - I have learned a tremendous amount and have met some wonderful people. I did notice some repetition in the 3rd year classes where we had repeat instructors.
- Good at Big Bash was great!
- Again, Accreditation process as an elective.
- The food was a lot better this year. My room at the UGA hotel was nicer. Overall, I had a great time at IOM. Kim is an awesome Board of Regent member!
- Thank you all for your efforts! You do a great job!
- I think the final 4.1 & 4.2 combined class was a challenge. I'd recommend not combining the classes for a course at all, or doing so earlier in the four years for a meet and greet in case they combine, etc. It was a great idea but didn't add much value so close to the end of the week. It could be neat to combine the classes as a general rule for one course a year across the board. Say, 1.1 and 1.2 will always be combined for one class during the week all four years, the same for 2.1 and 2.2, etc. That could create some momentum and make it less awkward than waiting until year 4. Also, the content of the last session taught by the board chair was a bit redundant and the course was difficult to focus on so late in the last day. If the board chair's class could become more of a facilitation session where the group can decide hot topics or scenarios to discuss in advance and then have class discussion, that would be wonderful!
- Great, great work! IOM in Athens is wonderful.
- I really like the structure of the program and how it really focuses on learning and being present in the sessions. I liked having the classroom style learning and such intense immersion into the program. The facilitators and instructors were great and I certainly left with some great takeaways and food for thought as I go back to my day job. I'm sure an immense amount of time, work and planning go into the conference, and it really shows through.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Would like to see a professional teach a human resource class. Don't agree with keeping everyone in class if the instructor is done before the scheduled class is over. If the instructor is done 5 or 10 minutes early, let us leave the class. What happened to vendors? Need ice during breaks. Would be nice to have a scheduled tour of Athens. I fly in so I don't have a vehicle to drive around. Shuttle buses by college students are awesome. They are were great. Would like bellmen service at Groomes Transportation drop off or just drop us of at the front of the hotel. Not a fan of Groomes Transportation. Most drivers are grumpy, smell like smoke. And they will pack you in their vans like sardines. Uncomfortable for a two hour drive. This year on my return trip to airport I was in a large shuttle and much more comfortable than the vans. I have yet to figure out why I never see anything to eat made with peaches! That's what I would expect to see in Georgia. Overall, the people are the best, nicest, most welcoming location. I love that you can stay and attend in same location. Very convenient. I think that most people outside of the Chamber world do not know what IOM means. It would be a good idea to educate the public/business world. I also think it would be a good idea to change the Certification to COM, Certificate of Organizational Management. Or Certified Organizational Manager. It makes more sense than IOM. Everyone ask what that means.
- I went into Institute with very little expectation and it was one of the best weeks of my life! Best decision I made and cannot wait for next year!
- More time was needed during most sessions for participants to help solve each others related issues to class topics. I'd like to start each non-core class with a quick intro of who is in the room - name, title and size of chamber. That would help me know who to connect with from similar chambers outside the classroom.
- Great event. Sunday is a wasted day and I think the Institute should start on Sunday and conclude on Wednesday.
- Surprised no closer at our Thursday's lunch: congrats, goodbye or, for returning attendees, see you next year!
- Not sure the combined last class was beneficial and the icebreaker was an awkward exercise.
- My overall experience was excellent and am proud to be an IOM Graduate. Information was valuable for my professional development and chamber team. I learn best with instructor leading class participation. For me, breakout groups sometimes can be distractions and drift off subject.
- Thank you all very much for all the hard work to make Institute successful! Special thanks to class advisors!
- Best Week Ever.
- Moving the "short" day to Thursday would help so much with travel arrangements - both for flying and driving. The food at lunch was mediocre at best. Enchiladas for a group that large seems like an odd choice, and lasagna is very heavy (and honestly nap inducing).

**ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.*



SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I would encourage Institute to look at how they lay out the schedule. Having a full day (7 hours) of classes the day after everyone graduated the night before doesn't work great. Some people are mentally checked out since they graduated. And the last session of the program for the two graduating classes was not good. I have no idea what the topic even was and it was not at all effective, which was a common opinion of those in the class. It was a bit of a disappointing way to basically wrap up a four year program.
- It would be nice to end early on Thursday instead of Tuesday so we could hit the road and travel back home. It's hard to be away from my family (3 kids under the age of 5).
- Lunch - the boxed lunch is actually the best lunch you all offer there. It's a bit "heavy" to eat lasagna and then go sit in class.
- Overall I love institute but primarily for the knowledge sharing of faculty sharing actionable takeaways and for the ideas I get from my cohort classmates.
- I learned so much! It was a phenomenal learning opportunity, met some wonderful humans in this sometimes crazy profession of non-profit world (okay - most of the time crazy... but in a good way!), and I cannot wait to continue in this experience next year. Thank YOU for putting all of this together, from the curriculum to the venues to the shuttles, the meals, the programming, the information provided on-site, the app - which was so helpful, the reservations and planning of events, coordinating the right people together - it was almost magical. But I know that events like this don't come together from waving a magic wand and hoping that everything just falls into place. They come together because people like YOU care, and work hard, and want to make it the best for the lucky people like me who were able to experience it. Truly, thank you for such a wonderful week!
- Can't wait for next year!
- I actually liked the lunch where we sat with others than our class. It may have worked better on the 2nd lunch.
- Food was not great but understand we are at a conference center. We do appreciate all the drinks available (water, cokes, etc).
- When I signed up for Institute I was expecting something completely different. As I entered the class room I felt the environment and knew it was much more that I had expected. I learned wonderful lessons while there and made networking connections to last a lifetime! I cannot wait to return to Institute next year!
- Some topics were too broad, had too little substance. Would like to see more drill down.
- Please change the early day to Thursday, from Tuesday. For those of us who have to travel, making us stay until 4 on Thursday costs our chambers additional money for lodging and accommodations. Also, the last session on Thursday is very difficult to stay present and it does not do the class, or the instructor, due service.
- Great program and hope that after graduation there is opportunity for bi-annual refresher?

**ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.*



SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Institute is a wonderful way to grow and develop your skills in the Chamber/Association industry. It was an honor to be able to attend. I enjoyed every second and cried like a baby when it was over. Can't wait to see all my friends again next year! I would like to offer my sincerest thanks to everyone involved in putting together such an outstanding and well-rounded program...THANK YOU!!!
- 3rd year was by far the best year at Institute.
- Awesome job from the faculty and staff. The only recommendation I would make it to make the shorter day on Thursday and Tuesday the longest day (Swap Tuesday and Thursday) so those traveling by air have enough time to get from Point A to Point B without being rushed.
- I don't know if it was this site in particular (was at Northeast last year) but met a lot of lower level individuals. Great for their interest to grow and develop but they don't bring anything to table. i'm thinking there should be a minimum # of years of experience needed (and not even at a high level) just so they have a clue. A lot of time was spent in some of my sessions addressing basic questions and not then spent on higher level/strategic thought.
- The first year I attended Institute, there were vendors in the hotel lobby. This was beneficial because it gave me a face/name to contact directly. It also solidified our software future. With so many chamber and associations in one group, the vendors add an even more relevant element to Institute. Please consider bringing them back.....Weblink, ChamberMaster, Constant Contact, and others.
- Athens was such a great experience! Restaurants and nightlife were conveniently located. I also appreciated all IOM sessions being on one site in one building.
- Well planned and organized Institute. Some instructors wanted class members to have printed materials; however, I felt that 50-100 pg files were very accessible via the online app. Some handouts and/or presentations had changed since they had been uploaded to the app, but most had remained the same. Prefer the online handouts, which are easily saved to Dropbox, etc. Thank you for an excellent experience!
- Excellent week. I learned so much and hope to implement many of the ideas and practices that were taught. Thank you for such a well-run and relevant program.
- Our class advisor, Beth, was VERY helpful. She answered lots of questions even before I knew I had questions.
- Institute is amazing! I don't want my 4 years to end! The coursework is challenging, my classmates are amazing and the faculty and staff is wonderful.
- The food this year was a little "blah." Could you please consider getting rid of the lasagna? I did feel like the meal at graduation was a great improvement over last year.
- Also, it may be beneficial to move the 2:00 p.m. day to graduation day or even Thursday when everyone is trying to leave. It is a great "break" that we all appreciate, but I feel like having it on Tuesday kills the momentum. I know if you moved it that would then complicate the additional things that are offered, though.
- Overall, the Institute was definitely worth the time and money invested.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I would love to flip the Tuesday short day schedule with Thursday at this site. Many attendees face driving to Atlanta at rush hour on a holiday weekend--it is beyond daunting.
- Having the shortest lunch on the longest day doesn't make much sense.
- Many of my classmates and I agreed that it would be SO helpful to arrange the schedule so that we could conclude earlier on Thursday allowing for travel. Most of us either have 5 hr+ drives OR make air arrangements. The 4pm dismissal put us right in the middle of Atlanta rush-hour. It took me 2 hrs alone to navigate from Athens to I-75. The drive is obviously not impossible, but after a solid day of classes, it is much harder, especially for those of us who HAVE to return to our small chamber the next day and function. :) Many of my classmates missed flights last year b/c they could not get to the airport and so can only schedule 9-10pm flights to ensure they make them. Please, please, please consider reworking the schedule.
- I wish you would consider an alumni track, even if it was only 2 days long and only electives. Thank you to all who put in the time and effort to pull off this event!
- Overall I feel like IOM SE needs to figure out "who you are." There is a lot of awkward judgement going on from staff to attendees. We know the history of IOM SE, and we can see there are moves to get away from what the culture once was. I feel my class is no where near behaving in the manner we have heard stories about. In the meantime, one of the only reasons I come back is because of the connections I have made with my class, and the fun we have. If you have events that have alcohol, dancing, and singing...people will drink, sing and dance. They might even say or do a few things that are not "professional." So...what does IOM want this program to be? Strictly professional? Then perhaps take out the drinking, singing and dancing. Do you want us to have "fun" yet stay within closer boundaries? Please be more direct about that then. Write these behavioral expectations out. Have advisers go over these with each class. My class feels like we are being talked about behind closed doors, but no one addresses if there is a problem with us that we are unaware of. We would like the IOM staff to be more clear on the gray areas on which we are being judged. It made this year slightly negative for us; however, we still found ways to enjoy our time together. I will reiterate with the majority of classes I took this year not meeting my expectations, my classmates, and the bond I have with them are the only reason I am coming back next year. I hope we will feel more welcome next year into a positive and clear environment, particularly from the IOM staff. The Board of Regents and Advisers were wonderful to us, and we appreciate that.
- I would have liked to see Marketing plans that work for chambers. we had a core class for 2-1 called Marketing Strategies, however was not helpful. The instructor talked more about strategies for corporate or for-profit businesses. My class was disappointed we weren't able to have any take-aways from it.
- Great staff, volunteers. I would definitely suggest adding breakfast to the menu- hotel staff was not prepared to handle to number of people who wanted a continental breakfast- and they never added staff throughout the week (I know small detail but would have improved networking) Also- please add ICE TEA to the breaks- not everyone drinks coffee or soda (again small detail but alot of people asked about it).

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- A challenge to the "we've always done it this way". An earlier dismissal on Thursday would be very beneficial. Trying to get to ATL during rush hour is difficult. Reducing just four of the six breaks by 10 minutes would allow for a 3PM dismissal. There are several other alternatives that could save 60 minutes.
- I think if you could find a way to end institute at 2:00 on the final day so some can catch a flight out on that day and other avoid rush hour traffic it would be very beneficial.
- I get so much from Institute to help catapult my Chamber to a whole other level, that benefits all levels: The Chamber; the Members; the Businesses; Potential New Businesses; the City Government relations; The County Government relations; State Government Relations; the Community. The resources and learning levels help to drive all these areas beyond where we are, to a level that we need to be to see our town thrive and grow.
- Please look into a different charter service for the rides to and from the Courtyard Athens. It was a very poor service and bus itself was not in the best of condition. It leaked when it rained, several windows were cracked, it did not smell very pleasant and the driver had a difficult time maneuvering the roads. She was very pleasant though!
- Institute was a wonderful learning experience. I enjoy making the connections with people all across the country. Love the morning motivations on our doors!
- I was really disappointed that class 4-1 and 4-2 were combined for the last class. If it had happened all 4 years, that would be fine but having your final class together did not increase connections or add benefit. Additionally, on our final day, our two mandatory classes covered almost exactly the same topics.
- Would like to see us stay with our class on the first night - icebreakers should be in homeroom as we may have new classmates there. Took too long for the DJ to start playing after graduation ceremony - lost quite a few people after dinner - and the DJ that was hired was not very customer service focused. Check with the Chamber to see if there are other DJs available in Athens for our group.
- Serve a basic breakfast prior to the start of classes (they used to do this in the West institute) you can even get rid of the pastries at first break. Move the early day to the last day (Thursday) so more students can catch flights back home. The late day forces some students not to be able to return until the day after (or Friday) so they are in return taking more time away from work. Bring back the hospitality suite. This got rid of so many awesome networking opportunities.
- This was the most amazing experience of my professional career. I look forward to the next three years!
- OUTSTANDING CURRICULUM!
- I appreciate your willingness to offer special diets for those of us on restrictions. Even further options next year (more choices) for those of us who are gluten free and/or vegetarian would be great!
- I would like to see the institute start on Monday morning and end at either noon on Thursday or Friday. A 4 pm conclusion makes it impossible to complete travel.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- The only session that was a challenge was the Financial Fitness class. It was hard to stay focused. Lots of info and terminology that was a bit hard to follow. Plus, it was right after lunch, which may have made it even harder. The instructor was nice but he talked super fast and maybe a bit above the level of some in the class.
- I would rather dismiss at 2:30pm on Thursday instead of Tuesday.
- I would suggest moving the half day to Thursday and having the longer day on Tuesday.
- Can't wait till next year!
- It would be great if the early day could be on Thursday for those of us that have a long drive home.
- Overall, this experience has been extremely positive! The only comment I have is I felt that Unleash the Leader and Communicating with Confidence overlapped topics. Both leaned toward communicating effectively.
- Continue to create an environment that encourages collaboration. Our class is compiled of brilliant, creative professionals, who offer expertise of all levels and fields. Often times, the best ideas come from casual conversation and small group work. Sometimes, presenters dwell on themselves, instead of allowing class members to share. Our classmates are who we have grown to trust. Whether its more mixers among classmates, help fuel those relationships to evolve. We weren't trying to separate from others, we just know our trust our class with important information and issues.
- Would really like to keep the same Team leader. Jen did a great job and she bonded so well with everyone. Missed Emily also.
- We had great ideas in class. One thing that I would like is the opportunity to have maybe a 30 minute wrap up session at the end of each day. The classes moved so fast that some of our ideas needed to be cut off so we could move on. Following the day we would go our separate ways.
- The classes were all fantastic!! We moved so fast in a few of them I felt that a time to recap at the end would have been beneficial.
- Institute is a great opportunity for chamber professionals to grow, connect and learn about the industry.
- So impressed with how well everything was organized and how the schedule went like clockwork.
- Please describe the elective course names to what the class is. Managing Upward was more about managing your boss then teaching me how to become a manager.
- Let it Go - was was to heavy on material. Overload for sure.
- Great job on the food this year!
- Move the short day from Tuesday to Thursday. Almost everyone there wished the last day was shorter due to travel. It would be a lot easier to drive my 6 hours in the afternoon then after 4 pm.
- Instead of having an early dismissal on Tuesday for 4th year students, consider having an additional course so that 4th year students can be dismissed early on Thursday.
- Again, it would be nice for those of us driving long distances home, to have the "short day" on Thursday instead of the middle of the week.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Mark Fields - what a wonderful team member for you. Amy, our adviser, went out of her way to make this a positive experience. Thank you.
- I enjoyed my time in Athens. As a transfer from Tucson, the fine folks in my class welcomed me with open arms and made me feel like family.
- Ending at half day Thursday would have helped with travel plans.
- Fantastic feeling of accomplishment when you leave IOM even for a first year. What a great way to ignite a fire for those of us that may have become complacent. Thank you all for making this a great program!
- Having a first time class advisor with the first year students was not ideal. We were unprepared for what to expect, did not have numbers for the icebreaker game, weren't told to sit with our class at kickoff, etc. She was FABULOUS, but as a first year, I would have liked more guidance.
- Can we PLEASE swap Tuesday and Thursday. Getting our at 4pm is such a pain for all of us that drive. We get to Atlanta right at rush hour. This was voiced by multiple people within the Institute Organization.
- It seems like all of the networking events are focused around drinking. I suggest you create some non-alcoholic networking opportunities. Also, it is silly to have Tuesday be a short day and then keep people to 4pm on Thursday. Driving from Athens to Atlanta at rush hour before a holiday weekend to catch my plane is very poor planning.
- It would be very helpful to have faculty members that relate the material specific to the chamber world and not feel so pressured to run through a power point to miss opportunities for us to leave with tangible takeaways. Having examples is what helps us to implement new ideas. It would also be great to be able to see the faculty member teaching the courses when we do registration as not all teachers connect with each of us and learn better with different formats. Several of the faculty who taught electives and core classes also used some of the same material so it was repetitive.
- 1. There are few speakers that have been coming for years...one of them spent the first 30 minutes telling "stories" that we have all heard before as third years. I realize he has great knowledge to share but I want to learn more not hear the same stories year after year. 2. I think we should hold the core session on Tuesday afternoon and finish earlier on Thursday. For those of us that fly in/out of Atlanta it makes for a very late night and we do have to work on Friday.
- The "early" day should be the last day of Institute.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Was very disappointed in two of my classes: Managing Upward: Elective Marketing Methods: Core Both of these courses were taught by Chakisse Newton. I would not recommend her as the IOM faculty member to teach the Marketing Methods class again. She doesn't have the awareness needed in Chamber and non-profit to tailor the message for CHAMBER MARKETING. When asked in our class SEVERAL times to give specific examples for Chambers she simply said "No." Then, when quite a few of us had our hands up for several minutes, she said ""I see you, but I really don't have time to address any more questions."" After speaking to most of my classmates we left that class feeling dismissed and frustrated. I am familiar with what a value proposition is, per my PR/Marketing degree, but many of my classmates were very confused. So, upon arriving home I did a LONG post with EXAMPLES on our Facebook group page to help clear things up, where she muddied the water. While she is brilliant at marketing, she is not brilliant in tailoring it to our specific and unique world of Chamber. In the future please choose a brilliant marketing mind from the CHAMBER world, who truly can understand the strategies and struggles.
- The Managing Upward class name needs to be changed, or either a specific description needs to be given at the time of registration. I signed up for it not knowing the entire course would be about "handling difficult managers." Had I known that, I would have opted for a different elective.
- PLEASE: NO MORE LASAGNA AT LUNCH! That is such a heavy meal and makes for a difficult afternoon in class.
- Thanks!
- Thursday's session needs to end at noon due to many participants having to deal with Atlanta traffic.

**ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.*

WEST BOARD OF REGENTS



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

2016 ROSTER

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WEST BOARD OF REGENTS



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

2016 ROSTER

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Term: 2010-2016



AGENDA

SEPTEMBER 30, 2016

10:15 A.M. – 12:00 P.M. EDT

U.S. CHAMBER OF COMMERCE
WASHINGTON, DC

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

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



MINUTES

JULY 10, 2016

11:00 AM PDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

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

I. Welcome and Introductions

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

II. Board of Regents Business

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

III. Class Advisor Welcome and Introductions

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

IV. Responsibilities of Class Advisors

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



MINUTES

JULY 10, 2016

11:00 AM PDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

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

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



WEST

2017 SCHEDULE OF ACTIVITIES

PLEASE NOTE THIS SCHEDULE IS TENTATIVE AND SUBJECT TO CHANGE

Sunday, July 9

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

Monday, July 10

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

Tuesday, July 11

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

Wednesday, July 12

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

Thursday, July 13

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



WEST

2017 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

Class Advisors

Brad Lacy

Silent Auction/Fundraising

1. _____

2. _____

3. _____

Industry Consultations

1. _____

2. _____

Scholarships

1. _____

2. _____

3. _____

Institute Kickoff

1. _____

2. _____

3. _____

Big Bash

1. _____

2. _____

3. _____

Volunteer/Faculty/Staff Dinner

1. _____

Lunch Roundtable Discussions

1. _____

2. _____

Social Media Strategy (Optional)

1. _____

2. _____



WEST

GEOGRAPHIC BREAKDOWN

2016 West Institute
117 Attendees from 31 states and the District of Columbia

State, Number of Attendees, %

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

Top Increases Since 2015:

California	+9
Texas	+2
Arizona, Connecticut, Michigan, Missouri, North Carolina, Nebraska, Nevada	+1

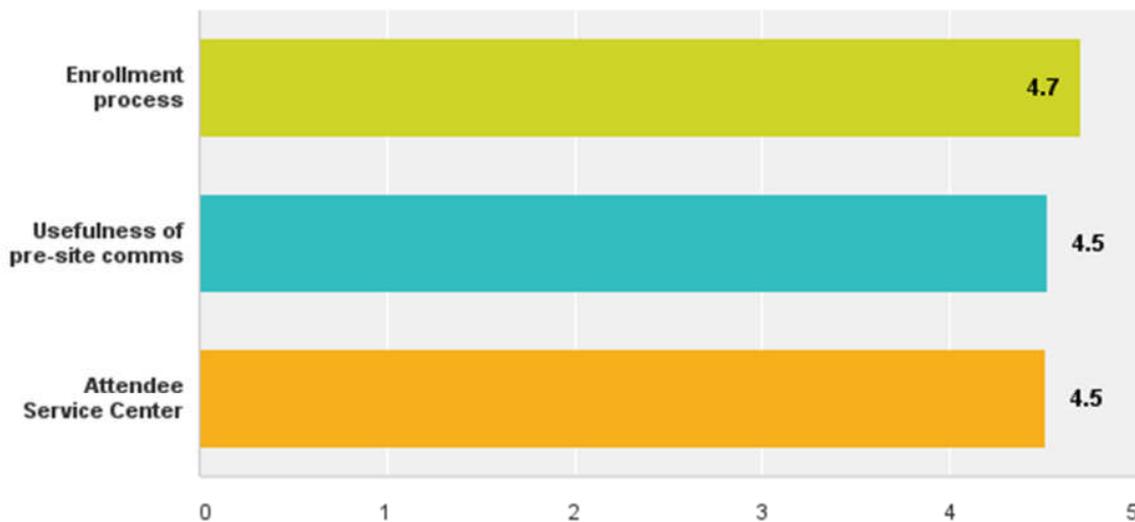
Most Attendees in 2015, Texas with 22

Most Attendees in 2016, Texas with 24

ATTENDEE SURVEY RESULTS AND FEEDBACK

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

Answered: 77 Skipped: 1



Additional comments about registration and communication*:

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

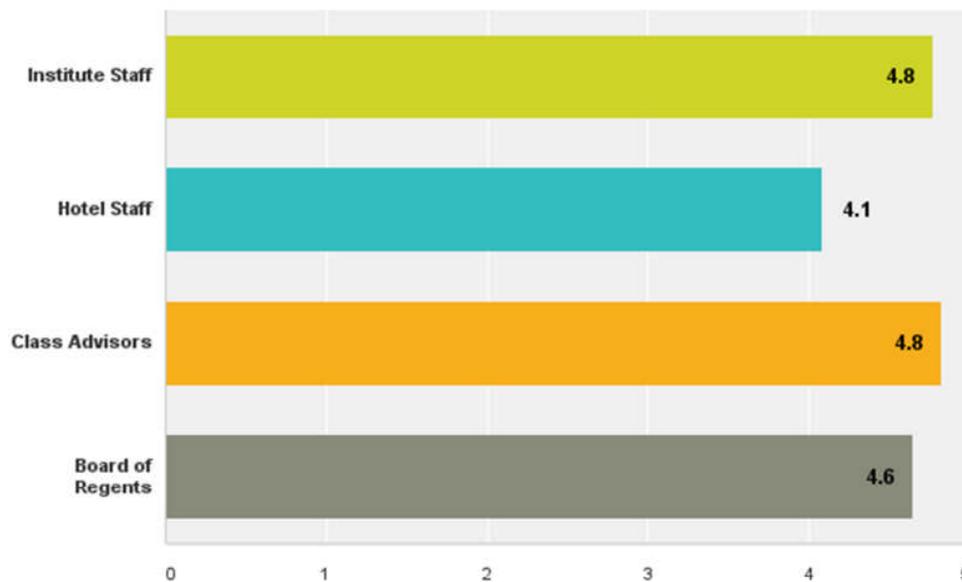
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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q5 Customer Service

Answered: 77 Skipped: 1



Additional comments about customer service*:

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

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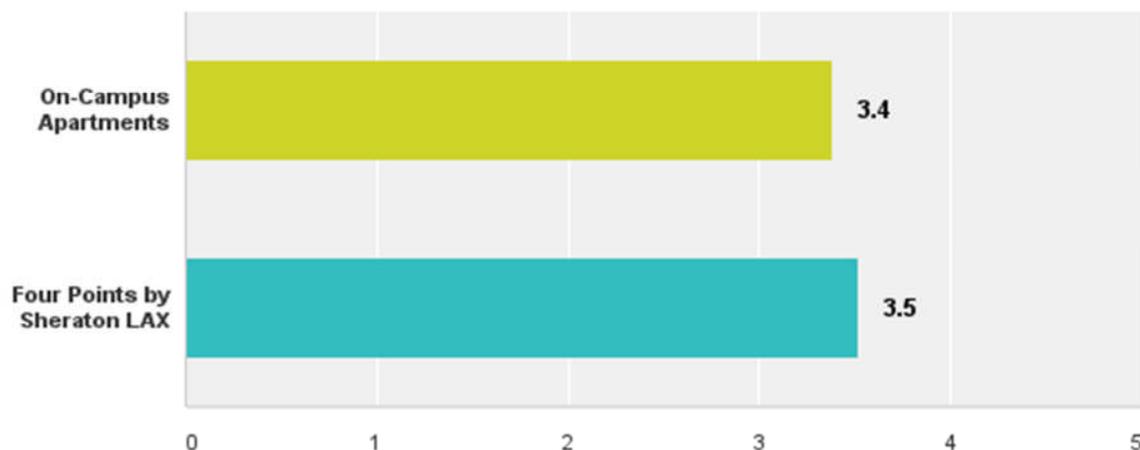
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ATTENDEE SURVEY RESULTS AND FEEDBACK

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

Q8 How would you rate your accommodations?

Answered: 76 Skipped: 2



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ATTENDEE SURVEY RESULTS AND FEEDBACK

Additional comments about accommodations*:

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

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ATTENDEE SURVEY RESULTS AND FEEDBACK

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

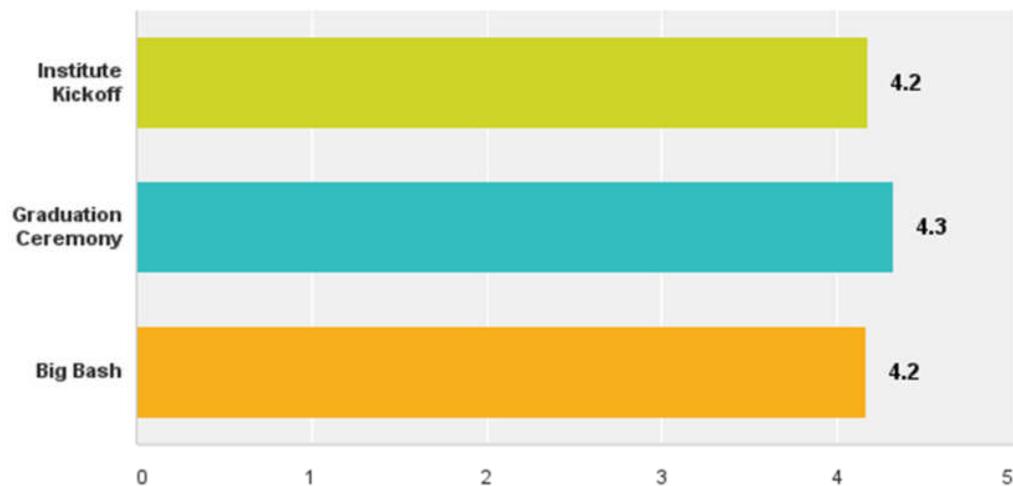
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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q10 Please rate your experience at the following Institute events.

Answered: 75 Skipped: 3



Additional comments about Institute events*:

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

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ATTENDEE SURVEY RESULTS AND FEEDBACK

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

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ATTENDEE SURVEY RESULTS AND FEEDBACK

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

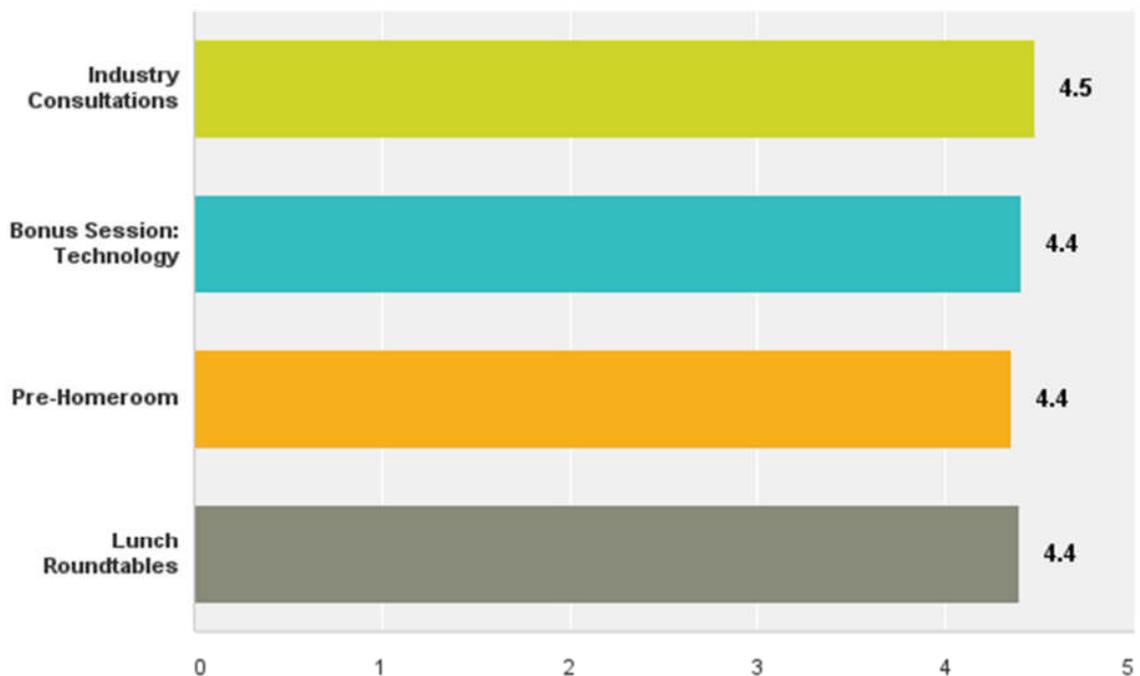
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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q12 Please rate your experience participating in additional learning opportunities.

Answered: 75 Skipped: 3



Additional comments about learning opportunities*:

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

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ATTENDEE SURVEY RESULTS AND FEEDBACK

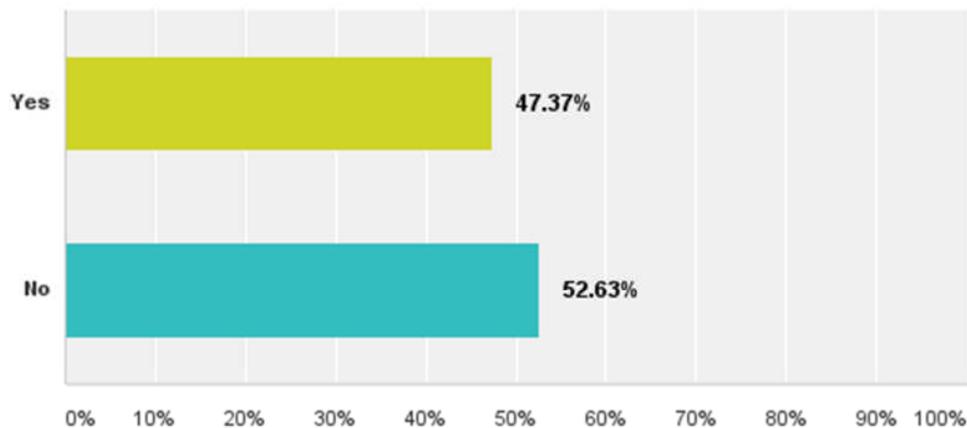
- The Pre-Homeroom prepped me for the week. I did not participate in round tables only because I was a little burned out from everything else.
- I did not have the opportunity to take advantage of the industry consultations and Bonus Tech session. My awareness of these was rather low.
- I wanted to attend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

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ATTENDEE SURVEY RESULTS AND FEEDBACK

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

Answered: 57 Skipped: 21



Additional comments about the silent auction*:

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

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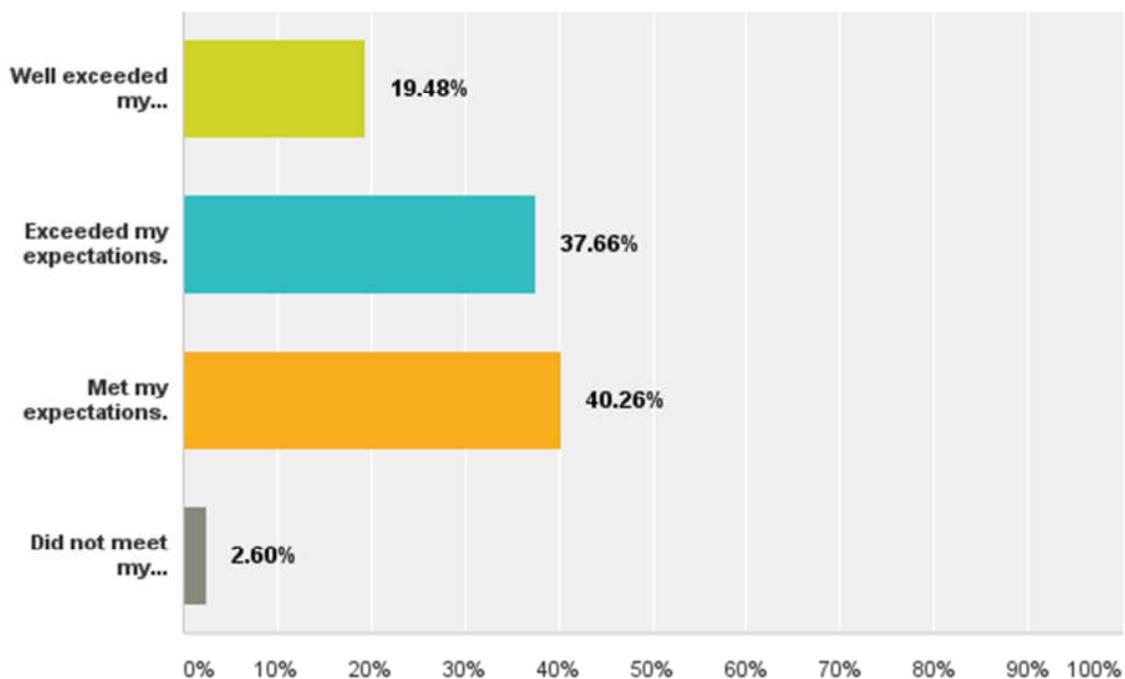
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ATTENDEE SURVEY RESULTS AND FEEDBACK

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

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

Answered: 77 Skipped: 1



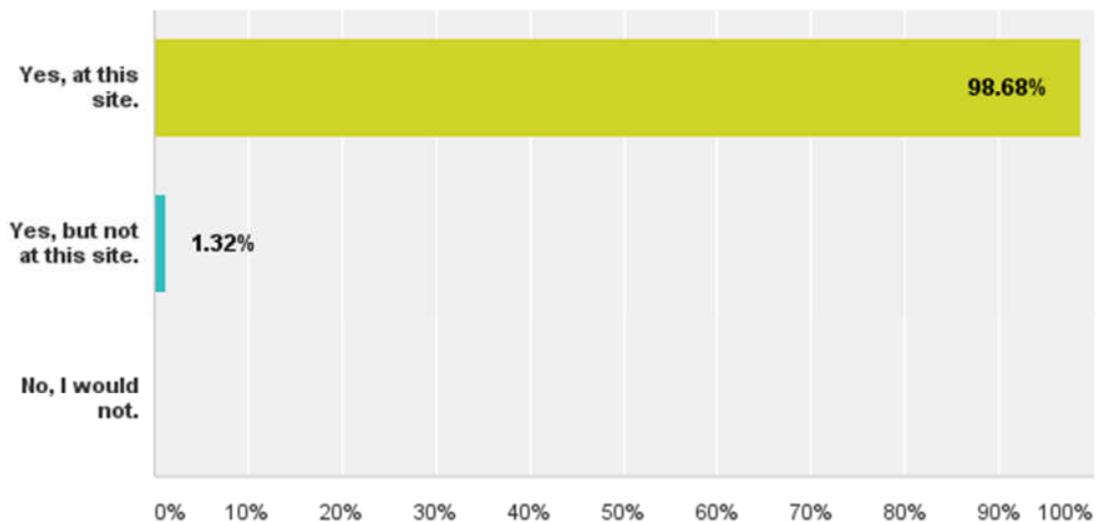
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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q23 Would you recommend Institute to other nonprofit professionals?

Answered: 76 Skipped: 2



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

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

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ATTENDEE SURVEY RESULTS AND FEEDBACK

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

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ATTENDEE SURVEY RESULTS AND FEEDBACK

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

Additional comments about Institute*:

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

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ATTENDEE SURVEY RESULTS AND FEEDBACK

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

**ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.*



WEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

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

**ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.*



WEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

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

**ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.*

NORTHEAST



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

2016 BOARD OF REGENTS ROSTER

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NORTHEAST



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

2016 BOARD OF REGENTS ROSTER

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Term: 2015-2017



NORTHEAST

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

AGENDA

SEPTEMBER 30, 2016

10:15 A.M. – 12:00 P.M. EDT

U.S. CHAMBER OF COMMERCE
WASHINGTON, DC

- | | | |
|------|--|-------------------------------|
| I. | Welcome and Introductions | Chris E. Wallace, IOM, CCE |
| II. | Approval of Minutes | Chris E. Wallace, IOM, CCE |
| III. | Nominating Committee Report | Steve Clark, IOM, J.D., CFE |
| IV. | Analysis of 2016 Northeast Institute
A. Final Enrollment Report
B. Survey Results and Discussion of Institute Week | Board Members/Institute Staff |
| V. | 2017 Northeast Institute
A. Create 2-3 Strategic Goals
B. Discussion of Week/Assign Regent Responsibilities | Steve Clark, IOM, J.D., CFE |
| VI. | Institute Staff Update
A. Program Updates | Institute Staff |
| VII. | Other Business/Adjournment | Chris E. Wallace, IOM, CCE |

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



NORTHEAST

MINUTES

JULY 31, 2016

11:00 AM EDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

In attendance: Chris E. Wallace, IOM, CCE; Steve Clark, IOM, J.D., CFE; Kimberly Guida, IOM, CAE; Gregory D. Buckler, IOM, MBA, MSM; Kate Conroy, IOM; Karen DelVecchio, IOM, CAE; Elizabeth Knowlton, IOM, CCE; Dan Lemyre, IOM, CAE; Claire Louder, IOM, CAE, MPP; Kellie K. Lowery, IOM, CAE, CPA; Peter McNamara, IOM, J.D.; Douglas O'Flaherty, IOM; Carrie Stuart, IOM; Marvin Bond, IOM; Patricia Jones, IOM, CAE; Amy Marquez, IOM; Karyn K. MacRae, IOM, CAE, CMP; Shelby A. Parish, IOM, CMP; Carly R. Flick

I. Welcome and Introductions

Chris E. Wallace, IOM, CCE welcomed everyone to the call and introductions were made.

II. Board of Regents Business

- Approval of minutes
 - The minutes from the July 7, 2016 conference call were approved with no changes.
- On-site regent responsibilities
 - Regent roles and expectations during the Institute week were explained. This included, but was not limited to: information on when to arrive at Bartley Hall every day; how they should network with attendees during meals and social functions; after-hours interaction with attendees; what to do while attendees are in class, etc.
- Regent meetings
 - Regents reviewed the schedule for meetings throughout the week.
- Visiting Homeroom
 - The group discussed visiting each Homeroom class.
- Additional business
 - Any remaining board business was discussed.

III. Class Advisor Welcome and Introductions

Carrie Stuart, IOM welcomed the Class Advisors to the meeting and introductions were made.

IV. Responsibilities of Class Advisors

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



MINUTES

JULY 31, 2016

11:00 AM EDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

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

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



NORTHEAST

2017 SCHEDULE OF ACTIVITIES

PLEASE NOTE THIS SCHEDULE IS TENTATIVE AND SUBJECT TO CHANGE

Sunday, July 30

11:00 a.m.–11:30 a.m.	Board of Regents Meeting: Health Services Building 200
11:30 a.m.–12:15 p.m.	Board of Regents & Class Advisor Briefing: Health Services Building 200
12:15 p.m.–12:45 p.m.	Board of Regents & Class Advisor Lunch: Health Services Building 200
12:45 p.m.–1:00 p.m.	Board & Class Advisor Additional Business: Health Services Building 200
2:00 p.m.–4:00 p.m.	Institute Registration: Bartley Hall, Atrium
2:00 p.m.–5:00 p.m.	Villanova Housing Check-in: Jackson Hall
3:30 p.m.–4:00 p.m.	Graduation Rehearsal (<i>4th year participants</i>): Bartley Hall
4:00 p.m.–4:45 p.m.	Homeroom: Bartley Hall, Individual Classrooms
5:00 p.m.–7:30 p.m.	Institute Kickoff: Radnor Hotel Ballroom

Monday, July 31

7:00 a.m.–8:00 a.m.	Breakfast: Dougherty Hall
7:00 a.m.–8:00 a.m.	Registration: Institute Office, Bartley Hall
8:00 a.m.–11:30 a.m.	Core Classes: Bartley Hall, Individual Classrooms (<i>Break: 9:30–10:00 a.m.</i>)
11:30 a.m.–12:30 p.m.	Lunch: Dougherty Hall
12:30 p.m.–4:00 p.m.	Core Classes: Bartley Hall, Individual Classrooms (<i>Break: 2:00–2:30 p.m.</i>)
1:30 p.m.–2:00 p.m.	Class Advisor Meeting: Faculty/Regent Lounge, Bartley Hall
6:30 p.m.	Class Dinners

Tuesday, August 1

7:00 a.m.–8:00 a.m.	Breakfast: Dougherty Hall
8:00 a.m.–11:30 a.m.	Core Classes: Bartley Hall, Individual Classrooms (<i>Break: 9:30–10:00 a.m.</i>)
9:00 a.m.–9:30 a.m.	Class Advisor Meeting: Faculty/Regent Lounge, Bartley Hall
10:00 a.m.–10:30 a.m.	Board of Regents Meeting: Faculty/Regent Lounge, Bartley Hall
11:30 a.m.–12:30 p.m.	Lunch: Dougherty Hall
12:30 p.m.–2:30 p.m.	Elective Classes: Bartley Hall, Individual Classrooms
7:00 p.m.	Faculty/Volunteer Dinner: St. Mary's Hall

Wednesday, August 2

7:00 a.m.–8:00 a.m.	Breakfast: Dougherty Hall
8:00 a.m.–10:00 a.m.	Elective Classes: Bartley Hall, Individual Classrooms
10:00 a.m.–10:30 a.m.	Morning Break: Bartley Atrium
10:30 a.m.–12:30 p.m.	Elective Classes: Bartley Hall, Individual Classrooms
12:30 p.m.–1:00 p.m.	Box Lunch: Box lunches available in Bartley Hall Atrium
1:00 p.m.–4:30 p.m.	Core Classes: Bartley Hall, Individual Classrooms (<i>Break: 2:30–3:00 p.m.</i>)
2:00 p.m.–2:30 p.m.	Class Advisor Meeting: Faculty/Regent Lounge, Bartley Hall
6:30 p.m.–10:30 p.m.	Graduation Ceremony and Big Bash: Villanova Conference Center

Thursday, August 3

7:00 a.m.–8:00 a.m.	Breakfast: Dougherty Hall
8:00 a.m.–11:30 a.m.	Core Classes: Bartley Hall, Individual Classrooms (<i>Break: 9:30–10:00 a.m.</i>)
9:00 a.m.–9:30 a.m.	Class Advisor Meeting: Faculty/Regent Lounge, Bartley Hall
10:00 a.m.–10:30 a.m.	Board of Regents Meeting: Faculty/Regent Lounge, Bartley Hall
11:30 a.m.–12:30 p.m.	Lunch: Dougherty Hall
12:30 p.m.–4:00 p.m.	Core Classes: Bartley Hall, Individual Classrooms (<i>Break: 2:00–2:30 p.m.</i>)
4:00 p.m.	2017 Northeast Institute Concludes



NORTHEAST

2017 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

Class Advisors

Carrie Stuart

Silent Auction/Fundraising

1. _____

2. _____

3. _____

Industry Consultations

1. _____

2. _____

Scholarships

1. _____

2. _____

3. _____

Institute Kickoff

1. _____

2. _____

3. _____

Big Bash

1. _____

Customer Service Strategy (Optional)

1. _____

2. _____

3. _____

4. _____

Social Media Strategy (Optional)

1. _____

2. _____



NORTHEAST

GEOGRAPHIC BREAKDOWN

2016 Northeast Institute 165 Attendees from 32 states and the District of Columbia

State, Number of Attendees, %

Arkansas,	2,	1.21%	Nebraska,	1,	0.61%
California,	1,	0.61%	New Hampshire,	1,	0.61%
Connecticut,	1,	0.61%	New Jersey,	8,	4.85%
Delaware,	1,	0.61%	New York,	5,	3.03%
District of Columbia,	17,	10.30%	North Carolina,	4,	2.42%
Florida,	2,	1.21%	Ohio,	1,	0.61%
Illinois,	3,	1.82%	Oklahoma,	4,	2.42%
Indiana,	4,	2.42%	Oregon,	2,	1.21%
Iowa,	2,	1.21%	Pennsylvania,	15,	9.09%
Louisiana,	2,	1.21%	Rhode Island,	2,	1.21%
Maine,	1,	0.61%	South Carolina,	3,	1.82%
Maryland,	8,	4.85%	South Dakota,	1,	0.61%
Massachusetts,	16,	9.70%	Texas,	7,	4.24%
Michigan,	3,	1.82%	Virginia,	39,	23.64%
Minnesota,	1,	0.61%	Washington,	1,	0.61%
Mississippi,	1,	0.61%	West Virginia,	2,	1.21%
Missouri,	4,	2.42%			

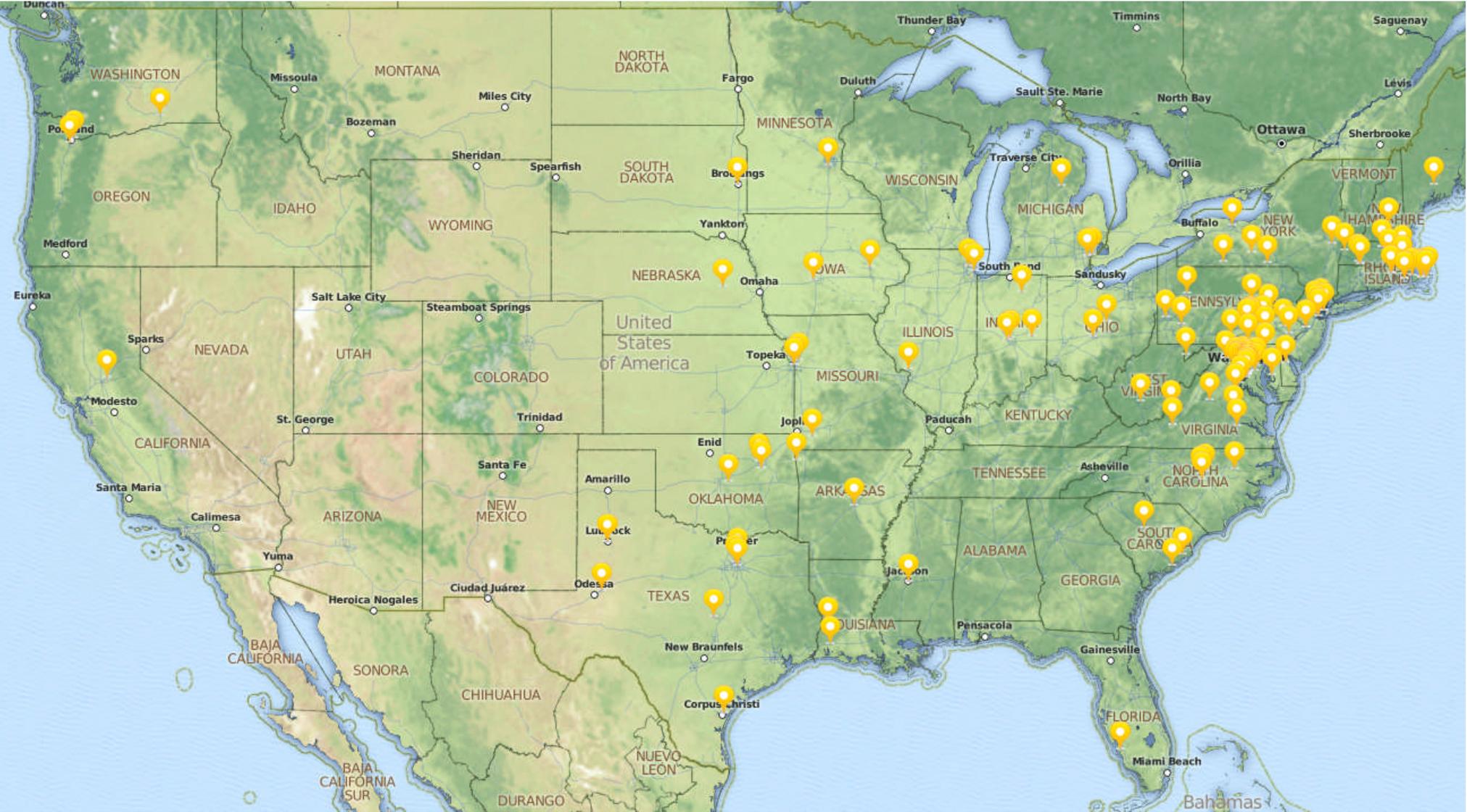
Top Increases Since 2015:

Virginia	+9
Massachusetts	+5
Arkansas	+2
Indiana	+2
Maryland	+2

Most Attendees in 2015, Virginia with 30

Most Attendees in 2016, Virginia with 39

2016 Northeast Institute Attendees



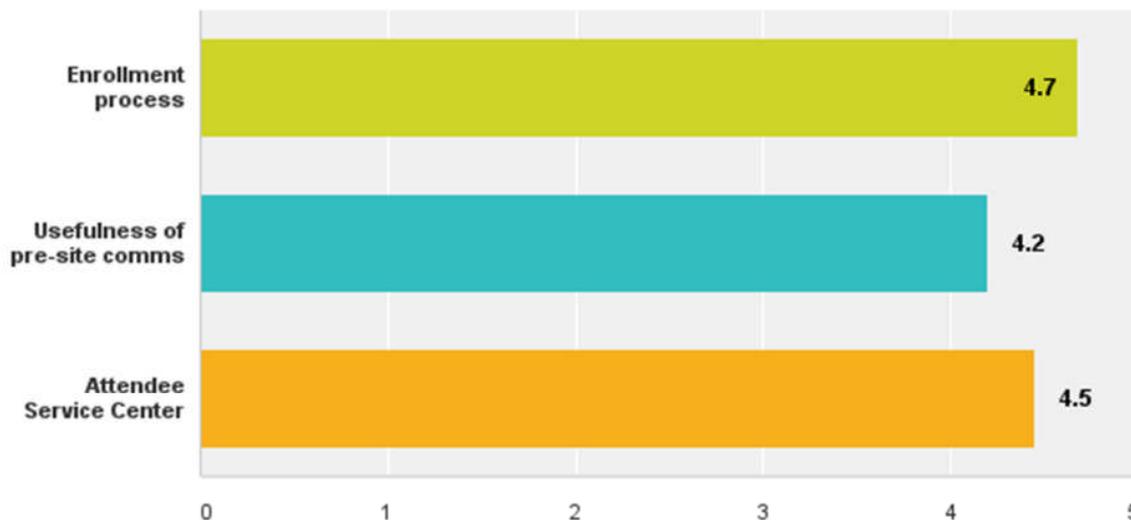


NORTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

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

Answered: 106 Skipped: 3



Additional comments about registration and communication*:

- I received limited (one, maybe two emails total) prior to arriving to Institute this year. I am not sure if this is normal or not. Also, more information about the area (shopping, restaurants, etc.) would be helpful.
- Simple and seamless.
- The instructors should have provided handouts prior to the sessions. I always like to read the information prior to the session.
- Appeared this year to be a lack of communication regarding almost everything. Not sure what happened but we know it will be corrected, thanks.
- Please consider providing a map of the campus before arrival, with clear markings of key destinations: registration building, dining hall and options, housing registration and buildings.
- The staff always does a great job in making everyone feel welcome and informed.
- Directions once on campus would have been helpful- we were lost for a half hour and made it to home room literally within one minute of being late.
- I never received an email from my class adviser before Institute.

*ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.



NORTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Since my org is not a US Chamber member, there was some confusion about my registration--had to be billed twice.
- Registration went well. The Attendee Service Center online didn't have information about the app (it still said "coming soon" even as I was sitting in class), and the ability to change electives was removed. I understand the possible need for that, but when the attendee service center says "change electives here" and then you can't, it's not optimal. Perhaps still have a link that says "change electives" but then replace the ability to change it with text information telling people to go downstairs to room X after this date.
- Needed more signage for first year students. Should have been told to check into dorm first then registration. Missed pre-home room.
- PLEASE include a map of the campus next year. It might have been somewhere and I missed it.
- Could have used more information being sent out via email about the schedule.
- I received no communication between registration and Institute. I had to reach out to receive the "know before you go" information the Friday before. Information that was supposed to be listed on the attendee service center was not available the week prior to NE Institute.
- The service center was lacking... a lot of materials were missing from the handouts and the attendee list was very small (in print form) and not useable as a PDF. didn't have any links to emails or anything. Additionally it was not available until 2 days before.
- We had less communication prior to Institute week than we did first year.
- A fair amount of communication was received. But it became mostly white noise.
- Everything went very smoothly.
- There was little to no communication leading up to Institute this year - something that many of our class remarked on.
- Got an email from our advisor saying handouts would be provided. Not true, and I didn't have a tablet/laptop. IOM site was tough to navigate. Attendee Service Center took you away from main site, then difficult to get back. Difficult to search for info (such as dress code...only found that embedded in the instructor's section).
- Our Class Advisor, Steve Clark was extremely professional and helpful.
- Registration was smooth. Communication from IOM was good, however my only comment is that year 2 class didn't receive any communication from advisor like last year. Steve Clark was awesome and explained that he was recently appointed to our class which explains the absence of communication from advisor.

**ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.*

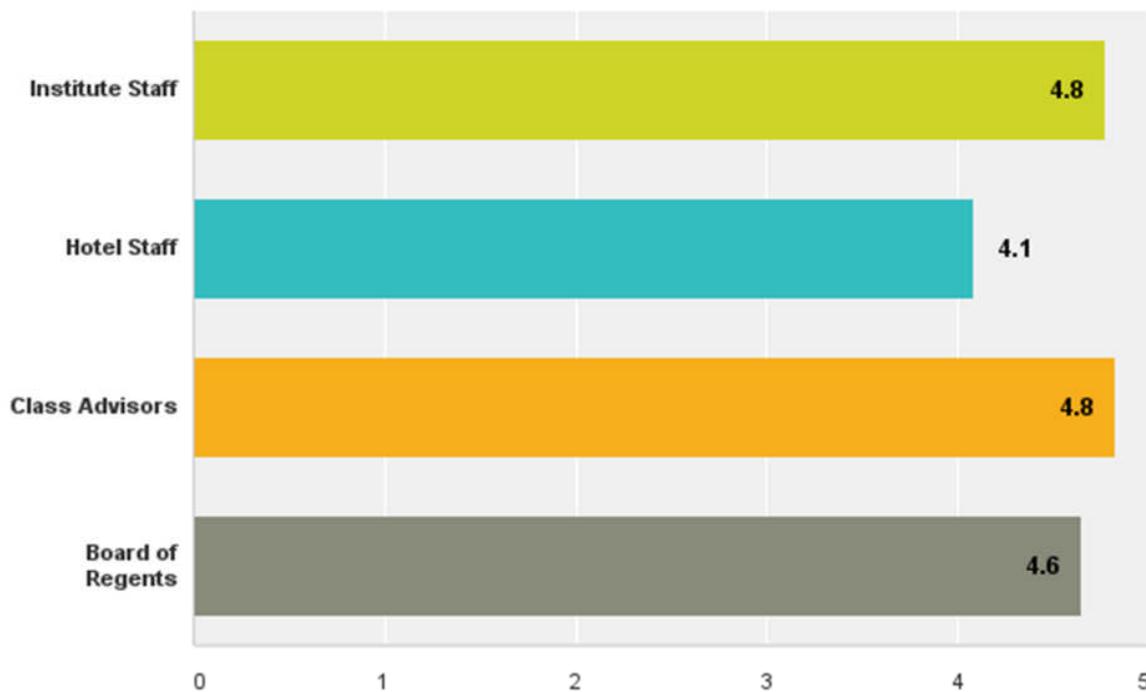


NORTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

Q5 Customer Service

Answered: 77 Skipped: 1



Additional comments about customer service*:

- Great service.
- Great people! Thanks for all your hard work!
- Great thank you.
- Didn't interact much with regents which is why I gave them slightly lower rating but the interactions I did have were fine.
- Board of Regents very visible.
- My class advisor got sick so the lack of service wasn't her fault. In general, with the promotion of class bonding, more needs to be done to help people from year 3 or 4 who had to move classes. The class bonding that others have enhances the feeling of exclusion when you intrude on another group as a newbie, especially in year 4. I feel like there could be more emphasis on this and less on giving treats, as cute as that was.

**ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.*



NORTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Wasn't really sure the role of the Regents.
- The hotel wasn't the easiest to deal with upon checking in and then I was called at 3:45 am to be asked to turn my music down when I was sound asleep (finally after being woken up at 2:30 am by my neighbors entering their rooms) and alas did not have any music or my tv even on. They should have investigated more which room it was that was disturbing guests by just walking down the hall. BTW this music I only then heard and it played until I left my room about 6 a.m.
- Again, I received no communication prior to Institute. I knew nothing about a class advisor or board of regents or their role in my attendance at IOM.
- Institute Staff, Class Advisor and Board of Regents were all awesome. They made the experience so much better.
- I had very little if any contact with Institute Staff and hotel staff. While I saw the board of regents, i am not exactly sure what their role is. Our advisor was a great guy, but felt more like a baby sitter.
- Institute staff, class advisors and regents are always so helpful and willing to jump in to assist. Thanks to all!
- I personally found it very unprofessional that a group of business professional adults found it necessary to partying in their dorm room each night, with trashcan holding the door open, while playing flip cup, tossing shots and the noise level that carried down the hall until the early hours morning and no concern for the attending professionals having to rise early, since they partied until the early morning hours, I spoke to the one Regents and she told me, "I have enjoyed the parties, and have made life long friends" Wow, and you were chosen to be a business professional.
- Love the staff, even the Florida Gator.
- Our Class Advisor was the best! He always kept us up-to-date on everything happening and communication prior to arriving on campus was great!
- Steve was very nice and helpful, especially since he stepped in at the last minute. It's certainly hard to beat Avon though, who was our advisor last year and was exceptional at communicating and uniting our class.
- Sad that Patty was so ill but enjoyed having Dan the Man back with us in her absence!
- The Institute Staff, Class Advisor and Board of Regents always went above and beyond. I am extremely grateful for everything they did for all attendees.
- The level of customer service at Institute is amazing.
- When I mentioned to a Board of Regents that my entire class was disappointed in one of the core instructors she didn't seem to care at all. She didn't ask me why.
- One thing I found highly offensive was when one of the regents handed out rainbow candy with a piece of paper on it saying "celebrate diversity." I am a Catholic, and this was in a Catholic college. I came for education, not for brainwashing. I expect to see an all-class email apology soon or I'll be taking this up with Chamber executives, as I am a member of the Chamber.
- This is definitely one of the best groups of people in IOM!

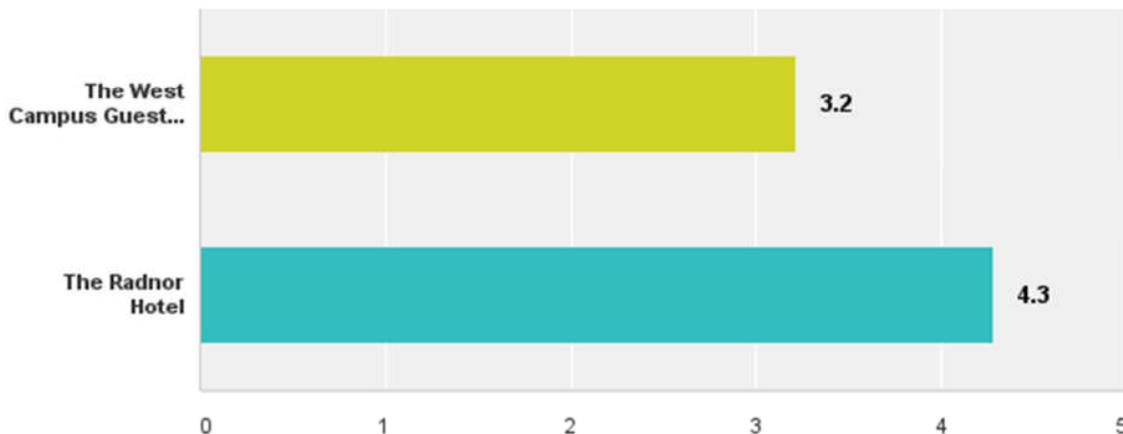
**ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.*



ATTENDEE SURVEY RESULTS AND FEEDBACK

Q8 How would you rate your accommodations?

Answered: 101 Skipped: 8



Additional comments about accommodations*:

- The bedding was damp and wet - enough that I had to bring the sheets/blankets to the laundry mat to dry before sleeping two nights in a row. Most likely will not be staying in the dorms.
- I will not stay on campus again. The blankets and sheets were damp and the apartment was musty and not clean. I could not get into the Radnor, but ended up moving to the Wayne hotel mid stay.
- Communications in the registration process seemed biased toward staying at Apartments, though the setting of a hotel is a better fit for regularly traveling professionals. I will chose the hotel option going forward.
- The air conditioning system is chilling, my colleague and I caught cold, and there was no TV in the apartment besides that no housekeeping.
- Sheets were constantly damp.
- My room at the Radnor was very damp the whole week I was there.
- The bedding was lacking--blanket was not sufficient and many of us staying in the dorm rooms had to spend out own money to purchase blankets. Please consider adding warmer options for bedding.
- Humidity in rooms caused everything to be damp. Because of that floor was sticky also. Felt the need to wear shoes entire time.

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NORTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- The policy of only allowing one blanket per registration at the dorms is ridiculous. They were freezing, and since they said they provided linens I didn't pack an extra blanket. When I asked for an extra, they weren't very helpful.
- The campus apartments were absolutely fine - I just wish the vending machines were operable.
- For a dorm they are fine.
- Terrible. Freezing cold, I mean freezing, dark, damp. I couldn't believe it.
- I loved the idea of having roommates and am glad I did it. I hope to return next year and am wondering if we'll have the option to request roommates. I was in my sleeping room with the door closed and overheard one of my roommates very loudly and callously talking on the phone to someone in the living room area, saying how stupid and young all of her roommates are. She basically put everyone from our class on blast. This was on Monday. Not cool. I chose to keep my mouth shut so as not to ruin Institute for myself or others, but I definitely don't want to have to be her roommate again in future years. Luckily, my other two roommates were really lovely, intelligent, non-rude women.
- Love the location.
- Last year the dorms were fine. This year they were extremely damp, sheets were wet upon arrival. We turned the AC down and eventually off because it was freezing. Nothing ever dried properly, it was very uncomfortable to sleep in.
- See notes above about the hotel.
- Upon arrival, I checked 4 different entrances at the dorms before finding the one that was unlocked. There was absolutely no signage directing attendees where to register for accommodations or for the conference.
- The rooms were nice, would be good if the breakfast could be worked into the room rate.
- The accommodations were wonderful, loved that I was able to stay right on campus grounds.
- I wish I had known to bring my own blanket to the guest apartment. I hardly slept at all the first night because my room was so cold, the blanket provided was as thin as the sheet (and if you call to ask for another blanket Villanova will tell you they have a "strict one blanket policy") and I was even sleeping in a sweat suit! I had to buy a blanket from TJ Maxx on my second day which was interesting trying to fit in my suitcase to fly home. I'll be more prepared next year.
- The A/C did very little for me.
- The room never quite cooled off and remained extremely humid the entire stay.
- Radnor staff was especially good this year!
- It fits my budget so it works.
- Couldn't get the room temperature right all week; beds are small (but I knew that beforehand).
- The West Campus Guest Apartments are nice. This was my third year of staying in them. Downfall this year, the rooms were extremely cold and we were not able to adjust the temperature. I froze the entire time.

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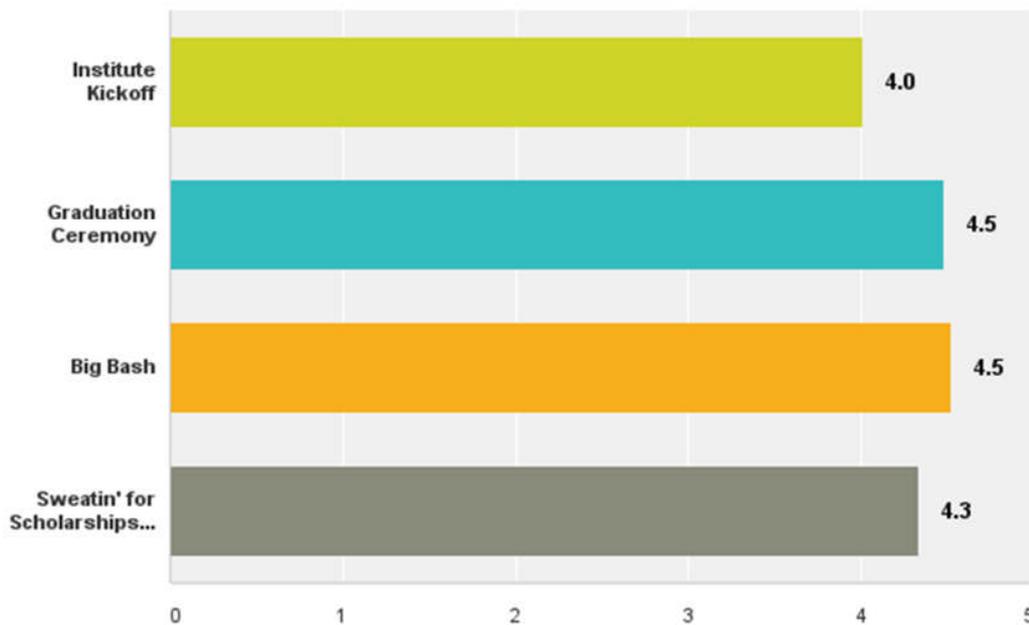
NORTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- A party on the first floor of the dorm every night which went into the night kept me and my roommates up. I am all about getting to know everyone, I just wish they would have closed the door around 11 or 11:30 to keep the noise down.
- Super comfortable bed. I'm calling to get the make and model as I do need to purchase a new mattress.
- Considering staying at the Wayne Inn next year.
- Only complaint is the air conditioning. Very difficult to regulate, very "wet" air.
- The Radnor is in need of a little TLC in the rooms. The food and bar and great.
- Extremely cold. Blanket was a joke and they wouldn't provide an additional blanket. Had to buy sweatpants and an additional blanket. Other than that, satisfactory for a dorm.

Q10 Please rate your experience at the following Institute events.

Answered: 106 Skipped: 3



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ATTENDEE SURVEY RESULTS AND FEEDBACK

Additional comments about Institute events*:

- The seated dinner was a great try.. But my steak was over cooked and took forever to arrive. Maybe try a different dish and seated dinner for next year that can come out quicker. Better than the buffet. Thank you!
- The meal was really overcooked, probably because they had to hold it for so long before serving us. I don't think dancing prior to the meal added anything. I suggest a little background music instead. I would also suggest having the graduation ceremony after the meal instead of prior to it.
- Institute Kickoff is a nice event - more information about scholarships.
- Big Bash - BRING BACK THE BUFFETT!
- The Big Bash meal is a mixed bag; the food was better with it being a plated meal, but took longer for the dancing to start, so I missed it due to a long day on Thursday with flight, etc.
- Kickoff Philly's are always bad every year they order them.
- Big Bash plated was a great idea, but food was brought out really late and most of the steaks were well done.
- Consider additional work out options--the zumba class looked like fun, but was held on the only day we had time to explore the area.
- Food at Radnor is very poor. Skip the regents introductions. Have a bbq on campus w/games or skip the games and ask a returning student to talk about their IOM experience or to share what they have implemented since attending.
- Service from hotel on big bash took 2 hours to get all meals. I happened to be next to last table. It was after 9:00pm before I got my meal. It was great once I got it, but took forever.
- Adding the games to the kickoff was a good idea, but I think the actual dinner part was lacking. It would have been nice to have a real program -- not a long one, but maybe something motivational from a grad, talking about how his or her IOM has really made a difference, something to get everyone psyched for the coming week. Event just seemed to be housekeeping.
- Liked the plated dinner at the Big Bash! That was a treat.
- The games were fun but it was very hot outside to hold them.
- Thought the big bash for the graduates wasn't as nice as it has been in the past. Always enjoyed seeing their photos or videos. Just seemed a lacking of celebration. Food was great though, next year have a non chocolate option too.
- Thought the games were a nice addition to the "Kickoff" - though having something inside may have been better due to the heat. Also, may want to have an "official" to the program so attendees know when they can leave if there choose to do so.
- Room at Radnor Hotel not big enough for Kickoff event--felt cramped.
- Big Bash - band great, more space useful. Food -- if you're going to offer steak, then people need a choice of cooking level! I ended up trading with a table mate when my too rare steak was more to her taste than her well done one. Probably safer to do chicken or pork. LOVED the offering of professional head shots. Should be done at every location. Kickoff games were a good addition but not well organized.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Bus times from the Big Bash back to lodging wasn't consistently shared, it was printed as one time, and verbally told at another time and then the buses showed up at a different time.
- I liked how kickoff was shorter this year! I liked the buffet last year better than plated dinner this year.
- Again, no signage at the location for the graduation and the big bash. It isn't that difficult to print a sign saying "Welcome NE IOM Attendees" with an arrow.
- It is really nice to have the graduation ceremony. The sound system for the speeches was horrible though. Dinner was very good enjoyed the plated.
- I liked the buffet better than the sit down dinner.
- Great experience.
- If at the kick off we could pay in advance or at least have the option.
- Didn't care for food at kickoff. Band at Big Bash was great!
- Atmosphere was great at the Big Bash, but the dinner service seemed to be pretty slow.
- I would have preferred healthier options at the kickoff. Additionally, having class reserved seating would be helpful. For the graduation ceremony, it would be helpful if people could hold applause until end - you can't hear where each graduate comes from once their name is announced. That would have been nice to hear. The big bash is always such a blast! Thank you!
- The band was awesome, again!
- The plated dinner took forever to be served. The buffet was much better. (Not to be picky but I'm not a fan of steak so I didn't eat much).
- Sound system at kickoff made it hard to hear and the dinner buffet was not good.
- I like the kickoff, but was not crazy about the food.
- Was a bit disappointed in the food at Kickoff, but it was a great opportunity to meet people not in my section.
- I was starving by the time they served the food. I wish they had more healthy choices for app's.
- I think next year if you offer the Zumba maybe make it mandatory and "charge" folks to not attend. I think more dollars would be raised this way.
- The Class Dinner was a little odd that we all paid for individual bills. It would have been a lot smoother if we were charged an additional \$50-100 for the overall cost. It made the dinner seem a little sloppy and odd. However, the restaurant handled it as well as they could.
- Great Big Bash dinner and band.
- When the grads are walking in, there should be music. And a little pizzazz.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q12 Please rate your experience participating in additional learning opportunities.

Answered: 106 Skipped: 3



Additional comments about learning opportunities*:

- The classes were so broad and so much to cover that we never were able to go into the detail on matter.
- Everything covered in pre-homeroom was covered in the registration and pre-IOM communications.
- The modules were informative and beneficial.
- The pre-homeroom is a prime opportunity for learning what the program is all about and for people to get to know each other. Everyone is new, everyone feels unsure about the next 4 days. Our pre-homeroom was the bare minimum about logistics and we zipped through it. There could have been time spent on each person introducing themselves, why they're there, what they want to get out of it, etc. Maybe have 2nd and 3rd year students in the class to answer questions about how to make the most of the experience.
- Comments made about you better be here even if you are throwing up were a total turn off.
- Have a list of industry consultations available prior to event.
- He was very nice but it's hard to dive into an issue in less than 15 minutes. Good idea though, to match people if it can help.

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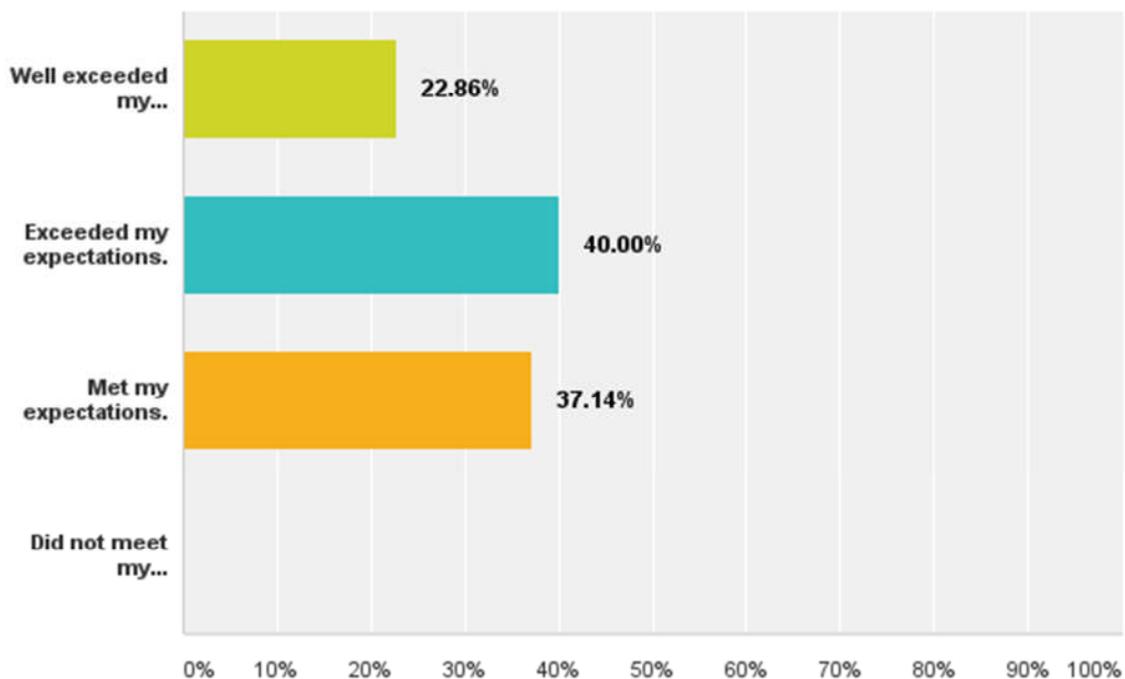
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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Because I was driving all over the place trying to find the registration areas, I missed these sessions.
- I think we could have done the pre-homeroom and homeroom things together.
- Lots of knowledge all very useful.
- The Pre-Homeroom was a nice ice breaker. I met one of my new close friends in pre-homeroom.
- I would recommend that at least one class could be held on Sunday afternoon and let everyone out 2 hours earlier on Thursday for travel. I had a 6 hour drive home on Thursday night and it was long after having classes for 8 hours.
- Pre-homeroom was most helpful.

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

Answered: 105 Skipped: 4



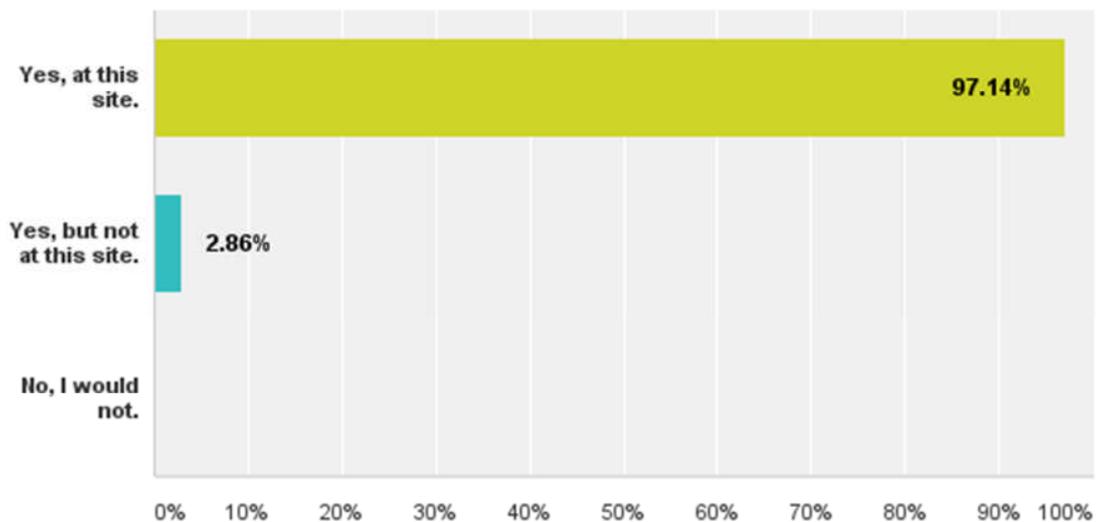
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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q19 Would you recommend Institute to other nonprofit professionals?

Answered: 105 Skipped: 4



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

- I did not find the 2nd year course work to be as valuable as the 1st year. I think this may be due to my level of experience--15 years in an association that is almost 100 years old with an established state & specialty section structure that functions well. In what I do, I would love to learn more about what associations need to be doing to retain millennials--effective meeting planning to attract attendees, cool events, a-la-carte memberships, large and small-scale engagement ideas, that sort of thing.
- Job hunting.
- I believe the topics were relative already, the classes themselves hit the topics surface without meeting the heart of the matter.
- Not sure of specifics, but new material (if it exists). Some of the programs seem to review previous years more than new stuff.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- I was very disappointed this year in the Trends/Industry Forecast session. The presenter provided more of a laundry list of things, and not a real focused, thoughtful analysis. Mick Fleming from ACCE has an awesome presentation on this, much more useful. Likewise, the Legal Issues class was lacking...seemed more like something that would be appropriate for first-years. "Is that Legal" taught by David Goch during my second year was much more in depth and appropriate. In general, much of this year's curriculum seemed more appropriate for earlier years than for a final "graduate" year.
- More info on the tier dues like formulas or examples.
- Technology; member management software; managing the balance between serving members and the need to conduct fundraising; financial forecasting and planning; effective fundraising strategies and techniques.
- Major topics could go further in depth- instead of trying to hit 3 bullets, hit one or two and really cover them. Several sessions were great, but instructors only got through half or less of their materials.
- Meaningful awards programs, enhancing data capabilities.
- I want deeper content on legislative issues! Perhaps it's that I have expertise in this area, but it is the one and only area that I don't think my knowledge was expanded by participating in institute.
- Deeper look at Financials, more classes surrounding events (planning, events that are proven to work etc.) I was disappointed with the one events class I had. Also - a class on membership/dues. How to structure them with sponsorships?
- Frankly, the events course this year was a waste of time and money. It was way too basic for anyone in the room.
- If they classes actually delved deeper into topics or took more of an executive level approach they may be more applicable to larger institutions.
- I really think you should have Bill Graham teach a strengthfinder course. He is certified in teaching it. Now that the instructor who taught this type of topic has retired it would be a good course I feel. Some of the courses could have been 2 hours that were 3 hours (e.g., ethics). Others that were 2 hours could be 3 hours (e.g. technology trends).
- Better coverage of Events, Strategies & Operations.
- Some of these courses were VERY basic. As someone who has been in the business for a longer period of time, I would appreciate a more advanced level of content. One of the core classes we took was a total waste of time to everyone in our class (Events: strategy & operations) I got NOTHING useful from this class. The instructor was a Chamber exec and totally geared the class in that direction. No association I know of does a parade.... Also in keeping with learning trends, it would be nice to see some specialization in the electives. I personally would love to have an HR specialization for NonProfit management.
- A course on strategic planning would be helpful, but perhaps that is offered in years 3 or 4.
- Skills to educate why it's important to be a Chamber member to new and young adults as business owners.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Staff engagement-- In large organizations with multiple brands under one umbrella, how to break down silos and work collaboratively.
- Understanding local politics.
- Chambers and Associations are increasingly being looked to and asked to respond and take a lead on social issues....gun violence and LBGT issues, etc. IOM needs to start leading discussions on how we as non profit professionals can navigate these issues. Also, i think some of Mike Gellman's classes--should be in the final year.....as they are not as easily absorbed early on in the curriculum.
- Things were covered that I didn't even think I needed. I am still fairly new in my position, so I am not sure what else I would need, but the institute gave me a great path to follow in my development.
- 4th year classes seemed to be repetitive. Repeat faculty on core classes was not a good idea, a lot of the material seemed to overlap.
- I would love to have an elective about component relations/chapters/divisions.
- A couple of the speakers were a little too Chamber oriented (noted on evaluations). It would be great to be able to have Bob Harris all 4 years!
- Create an events class that speaks about how you can collaborate with other chambers or associates who compete for the same attendees.
- Need more learning opportunities in a core class for membership retention.
- Well being. We all have very intense jobs/positions and we do not realize that we need to take time for ourselves. Throughout your work day, what could we do to help take away stress and make us work better.
- Volunteer Engagement / Being a good Steward.
- I know that you like to have Associations and Chamber folks together for sessions .. but it would be more of value if there were more direct electives targeted at trade associations.
- As I say every year, the core classes were mainly worthless, while many of the electives should have been core. And the classes, especially for year 4, were way too basic and should have been year 1 electives. This year was especially disappointing.
- Events: Strategy and Operations. This core class with Dawn Sharpe was extremely disappointing. Nothing was taught other than going around the room of 49 people hearing what their best event was. It would be very helpful to receive a powerpoint or webinar to address key strategy and operations so that we can elevate our events in our own association or chamber.
- Volunteer Engagement or Recruiting New Volunteers.
- This years topics and presenters were very good.
- A lot of us felt 2nd yr classes were not challenging enough for our skill level. We want to be pushed and challenged. That was lacking this year unfortunately in at least half the classes.
- Trends and best practices. Examples of what the best chambers and associations are doing.

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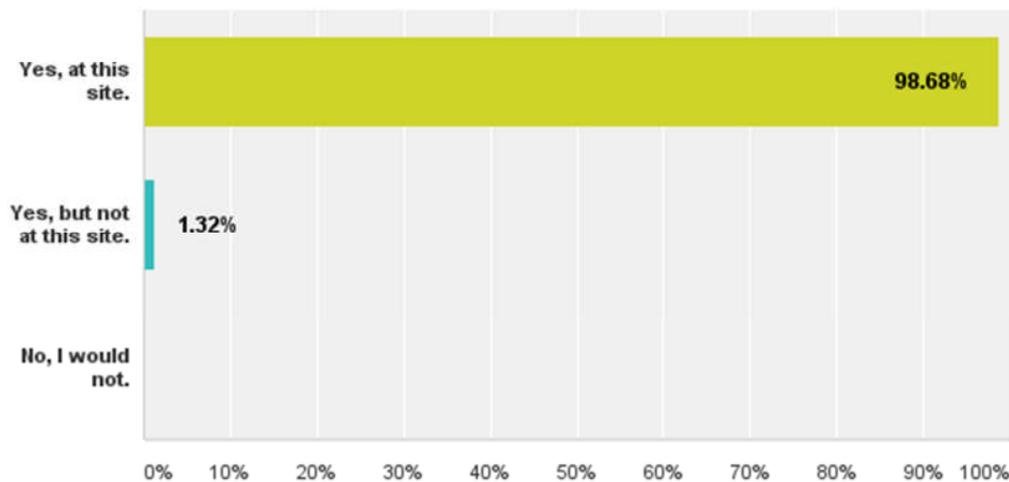


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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q23 Would you recommend Institute to other nonprofit professionals?

Answered: 76 Skipped: 2



Additional comments about Institute*:

- I do not find courses that focus on better customer service to be valuable. I already know the value and am good at it. I also find the brainstorming sessions to be much weaker as courses, especially 3 hour courses, because of all the great networking time we get. My point is that a lot of brainstorming and sharing of ideas tends to happen during breaks and social events so courses structured around brainstorming are repetitive and long.
- I didn't think the core classes this year were as great as in previous years. Maybe that's because I've been in chamber management now for almost 5 years but I also thought some of the instructors not as impressive this year.
- Thank you to staff for the hours spent preparing for Institute and their willingness to serve others.
- I enjoyed the games at the opening kick-off, and would love to have it thematic to our "Adult Summer Camp" theme for this year. Email to follow to Shelby.
- I was impressed by the quality of the instructors, UNTIL... I learned that the instructor teaching my class on leadership was teaching a completely different topic to another class. The instructor I had who taught about membership taught someone else on leadership. I'm sure there's overlap, but it seemed diluted when I learned the crossover.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- It would be nice to have class until 4 p.m. on Tuesday and be able to finish at noon or 1 on Thursday. I had to stay an extra evening because there wasn't a flight out that didn't require me to leave class early. We get plenty of time to network throughout the week.
- I found most of the instructors provided valuable information, but did notice that every one that I had has been with IOM for many years. While consistency is good, and I don't think you need to change for change sake, I think it would be good to consider some new speakers. When every instructor I had could recount there 10 or 15 years with IOM it makes me think there as not been much consideration of alternative speakers which may be beneficial. Additionally, I took an elective course with Frank Kenny on biz comm tech trends and did not find it valuable at all--very elementary and I don't think many got much from his session. I do not believe he is on the front lines in this arena and would urge you to consider someone new in this role.
- It's an outstanding program. I would further vet incoming "freshmen" faculty. Not every IOM graduate makes a good instructor! Spreading the word about this among my national partners. Keep up the great work!
- Over my four years, I can say that most (maybe 75%) of the courses offered were beneficial for me...some extremely beneficial. Those that come to mind were taught by Bill Graham (awesome on every topic), Bob Harris (the best!), Michael Gelman (makes a challenging subject worth paying attention), Sarah/Sheila Birnbach (miss her), and Reggie Henry (sorry he was not back this year). Bill Graham's "Using Data" was the best course this year. The Community & Economic Development course could have benefited from including some case histories. The second part of Frank Kenny's "Integrating Strategic Tech Solutions" was spot-on; however the first part was generally a laundry list of things and not really "strategic." Clearly the social media focus is Frank's wheelhouse and he does a good job with that. The other section lacked depth for a fourth-year course. Organizational Leadership for the Future was pretty good. I would recommend keeping that instructor.
- I would recommend starting the program earlier on Sunday and having a core class that day, to allow for a noon release on Thursday. As it is now, if we are flying in we have to come in on Saturday anyway, and if people are driving they can be there by Noon to start an earlier class. This request is for a couple of reasons, for those flying in, we are having to pay two extra nights hotel, Saturday and Thursday, because with getting out of class on Thursday at 4, if you take a flight home you will arrive around midnight or later, so generally you stay an extra night and travel on Friday. If we get out on Thursday early afternoon, we can still travel home and be home at a decent hour. For those driving in, traffic is generally lighter on Sunday mornings and then there is more time to travel home at a decent hour on Thursday if released earlier. Just a thought. Thanks for going back to paper Silent Auction, it makes it more interesting when you get to see who your bidding against. Hopefully y'all saw an increase in participation this year.
- While I enjoyed the vast majority of the sessions, I felt several of the professors might need to freshen their courses. Also, I think it is important for all the instructors to treat the attendees as adults.
- Overall the IOM was fabulous! I would like to add a few comments: 1) Having other groups on campus made breakfast/lunch difficult to eat in the allotted time 2) Change the last day to be the

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ATTENDEE SURVEY RESULTS AND FEEDBACK

shortest day (still take attendance and make it required - but for travel purposes and attention span, end earlier!) 3) For the class "dinner" I would have preferred an on campus pizza party (or whatever) so we could meet everyone and not be confined to our restaurant table 4) Please ask the University to change their fire drill schedule - they know when we are coming!

- I really enjoyed Institute. Thank you for all your hard work. Looking forward to graduating next year!
- Understand the time for all, but I do think the graduation bash was not as exciting as it had been in years past because, you really didn't get to know them thru their photos/experiences. Just a thought.
- I wish I'd known how awful the dorms were in advance, I would never have stayed there. Otherwise it was a wonderful experience!
- Some of my instructors (the classes about events and managing difficult employees) were not as prepared as they could have been and did not put as much thought into their presentations as they could have. It led to a lot of discussion time, which was good, but I left wanting more substance and real takeaways.
- I can't wait to come back next year.
- Revise schedule to end earlier on Thursday.
- There are vast cultural differences between institute sites that made navigating a new site far more difficult than I expected. Even being aware of those differences could have helped significantly. Otherwise, Institute is a wonderful program and I'm glad I did it.
- Really would like to see the time shift a bit - leaving at 4 is incredibly crazy! Could we do an extra hour on the Tuesday and get out by 3? Cut the breaks on Thursday to 15 mins each - something. Lunches - since the classes don't really mingle - why not stagger the times so the lines are less?
- PLEASE make Thursday end earlier. Traffic is a nightmare going back to DC (where most attendees live). You could make Thursday lunch a boxed lunch and shorten breaks. Or flip flop the Tuesday and Thursday schedule.
- I understand the need for a tight schedule but there was not enough time for meals. By the time we walked to the dining hall, stood in the long lines, sat down, allowed time to walk back to our classrooms and maybe use the restrooms, we had 10 minutes to eat. This was not sufficient time. The agenda provided upon online registration did not make it clear when attendees needed to arrive. Activities on Sunday seemed optional but upon arrival, I was told that pre-homeroom was required (as it was happening). Communication between the time of online registration and the conference was severely lacking and I found myself constantly feeling like I was under-informed. It made for a disconnected feeling the whole week. If I attend IOM again, I will attend a different location in hopes of having a better experience.
- The quality of the instructors was outstanding. The one exception to this was Ms. Smikle. She began the session assuming that we would not act in a professional manner, which clouded the rest of the session. I do not feel like she adequately covered the topic of Unleashing the Leader Within, barely touching on the objectives. We spent some time discussing the characteristics of Transformational Leadership, but did not expand on how to utilize the tools needed to be a leader.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

I don't think we spoke at all about deterrents to successful leadership. I would never take a course led by this instructor.

- While I appreciate members of the Board of Regents being present in the classes, I would suggest that they sit in the back of the room if they are going to be working on other projects (ie- Social Media). That was distracting in a couple of classes.
- Despite these two concerns, this was an outstanding professional development experience. I learned so much that will no doubt help me in my day-to-day work. It was obvious that care and consideration was given to each detail of the event to make sure that it was a positive experience for all attendees. The Institute Staff were helpful, professional and courteous at all times.
- I had a core class that focused on events that was horrible. Please do not invite the speaker back to teach, she did not deliver a quality presentation and didn't facilitate the time well.
- I would highly recommend ending institute by 2pm on Thursday. Many of us don't get home until after midnight and have to struggle with horrible traffic. I would either have a 2 hour class on Sunday at 4pm or have us go later on Monday or Tuesday.
- I was not sure that the class dinner was something that I would say I needed to attend. I could only talk with the 4 or 5 people who were sitting at my table. Perhaps a round robin type of thing with pizza where we could actually get to know others as well as hear a success and a failure story might be more beneficial. I really got a lot of good info from stories or experiences that others shared throughout the classes.
- I find the connections we make with each other the most helpful. I would consider making time for structured networking and best practice sharing. Having different fields of interest rooms and a facilitator for each area and sharing best practices during that time. I think the core of this program is good, but some of the execution feels like it done the way it is done because that is how it has always been done. We as professionals in an ever growing field should be on the cutting edge of change and transformation, not riding the late majority curve. (from Kyle Sexton's marketing strategies class).
- All of the topics were useful but the instructors did not always have time to cover the information. Either the time allotments should be increased or the topic focus should be narrowed.
- It's difficult to know what year a student is in at Institute. Only the first year students have ribbon. More interaction with other classes might be good.
- I didn't find Year 2 to be as beneficial to my professional development as Year 1. Some of the courses were a little basic for me. I also found that some of the courses seemed to veer off from the intended purpose. For example, the Meetings course - I expected to learn more about planning, contracting, etc., for meetings but in the end most of the time was spent surveying over 30 people (one at a time) to share their best ideas. I know I found it hard to stay engaged in that portion and think some of my colleagues did too. But this will not deter me from completing the 4 Years as I always learn something new.
- One suggestion would be to find a way to end earlier on Thursday in order for people to beat traffic out of town and catch earlier flights.

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NORTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I can't say enough about the staff, class advisors and regents. They are always so friendly and helpful. This year one of the regents (I can't remember her name) actually helped us to find a class that a group of us were running late for. I'm sure that she had a million other things to do, but took time to assist us. Many thanks. Until next year!
- I think you should add "Structured Networking" into the week. You can consider speed networking, but also make a big event small and have people with similar positions sign up for a networking circle and then have a moderator manage the circle. Each person goes around and introduces themselves, answers an ice breaker question like "What is your biggest challenge in your role" and then you can get to know each other better and development relationships more easily. Even Chamber professionals don't know how to network. I happen to be an expert at organizing structured networking events and would be happy to volunteer to help you put this together. I did speak to many of my peers in my class 2-1 and they all agreed this would be a value add!
- My overall experience was wonderful. I am so thankful that my Chamber allowed me to attend, so looking forward to the next three years.
- I certainly thought some instructors were much better at delivering their message than others (which is to be expected) and some flat-out lost control of the class by allowing SO MUCH class input (ie: "at my organization we do this...") that we didn't have time to fully cover the course material or if we did, it was very rushed. In general, most classes provided a fair balance of instructional material and best-practice sharing.
- While I loved the instructor for Financial Fitness and found his course to be incredibly informative, it was overwhelming to cover that much material in one class.
- Overall, I enjoyed my experience at Institute and wish we met more than once per year.
- Events: Operations and Strategy" was beyond a disappointment. There was no instruction, but rather sharing from all 50 people in the class what their "best event" was. Literally we went one-by-one for 2 hours? No strategy. No operations. A lot of time/investment was given for this 3 hours that did not deliver ANY value. I have no doubt that this was unexpected because this is so uncharacteristic of the rest of my experience with IOM. That being said, I feel that this content is owed to class 2-1. Perhaps Institute would be able to arrange a webinar with a different instructor to make up for the content that should have been provided in a core class? At the very minimum, someone needs to acknowledge and address this issue with our class. Thank you for the opportunity to provide this feedback on what was otherwise another exceptional year!
- Outstanding learning experience.
- I'm disappointed that most of my professors did not upload their material to the attendee service center. I was given their website to go to so their cookies can embed in my browser.
- Maybe start earlier on Sunday to have 1/2 day on Thursday - traffic at 4 PM was really rough
- Always a great experience at Institute!
- These past 4 years, I have made friends that I call on for advice and direction whenever I need assistance in their fields.

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NORTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- The only course I did not find useful was Events. Unfortunately the Instructor did not provide any practical information I could take back to use, instead it was very idea focused and relied too much on class input.
- This was a great experience. Enjoyed the four years.
- Overall, it was fantastic; and I hope my Board sends me back next year. The only thing I'll say is that a lot of it did not reflect my reality, coming from a low-income, largely non-English speaking city. IOM is stellar for places where people know what the Chamber is and can easily buy into the concept. For me, it's a daily challenge at the most mundane levels; however, what I've taken away from IOM will most definitely help even me. Very much looking forward to next year.
- I enjoy coming to Villanova each year and I love all of my classmates in 3-1, they rock!!!
- Please start to listen to this feedback when you ask for it. I know for a fact that many, many of us give the same feedback about the same bad professors every year, about the early day on Tuesday moving to Thursday so we can get back home to our families, etc. And every year nothing changes with many of the instructors or the schedule.
- I don't know if IOM staff had control of it, but I basically FROZE in all the classrooms this year that made it uncomfortable for the entire week in class.
- The last day of classes consisted of very basic education. The Meeting's class was very elementary and the whole class felt it was wasteful. However, I did get a nugget out of that one.
- It might be good to look at - going a full day on Tuesday, then getting out at noon on Thursday for the ease of getting flights home.
- Suggest letting folks out an hour earlier on thursday. Add in a few extra minutes throughout the week. It would reduce stress on a lot of is who have to travel home and avoid rush hour travel a bit. I think also a few classes could have been half the time and could have added in another class. For example: break GR into two parts and add a political component maybe?
- Northeast was truly a great experience!!!!
- Great experience. Met many great people. Very well organized. Would screen the elective courses better as some weren't challenging at all and would change the Financial Fitness course as it was an overload of un-useful knowledge.
- Make the short day on Thursday so everyone can get a jump start home. Also, if you're going to keep Tuesday as the 'short day' have some coordinated options/outings that attendees can participate in.

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