

# NORTHEAST



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

## 2017 BOARD OF REGENTS ROSTER

### CHAIR

**Steve Clark, IOM, J.D., CFE**  
President and CEO  
Fayetteville Chamber of Commerce  
PO Box 4216  
Fayetteville, AR 72701  
479-521-1710  
sclark@fayettevillear.com  
Term: 2016-2017

### PAST CHAIR

**Chris E. Wallace, IOM, CCE**  
President  
Texas Association of Business  
1209 Nueces Street  
Austin, TX 78701  
512-477-1006  
cwallace@txbiz.org  
Term: 2016-2017

### Marvin Bond, IOM

Vice President, Investor Relations  
Greater Irving-Las Colinas Chamber of  
Commerce  
5201 North O'Connor Boulevard, Suite 100  
Irving, TX 75039  
214-995-2397  
mbond@irvingchamber.com  
Term: 2016-2018

### Kate Conroy, IOM

Director, Member Services and Programs  
New Jersey Business & Industry Association  
10 West Lafayette Street  
Trenton, NJ 08608  
609-858-9499  
kconroy@njbia.org  
Term: 2015-2017

### VICE CHAIR

**Carrie Stuart, IOM**  
President  
Gettysburg Adams Chamber of Commerce  
1382 Biglerville Road  
Gettysburg, PA 17325  
717-334-8151  
carries@gettysburg-chamber.org  
Term: 2016-2017

### Jeffrey S. Albright, IOM

Director, Membership  
PA Chamber of Business and Industry  
417 Walnut Street  
Harrisburg, PA 17101  
717-720-5568  
jalbright@pachamber.org  
Term: 2016-2018

### Gregory D. Buckler, IOM, MBA, MSM

Lebanon, PA 17042  
410-707-0905  
gbuckler@comcast.net  
Term: 2012-2018

### Elizabeth Knowlton, IOM, CCE

Executive Director of Economic Development  
City of DeRidder  
200 South Jefferson Street  
DeRidder, LA 70634  
337-496-5064  
aknowlton@cityofderidder.org  
Term: 2015-2017



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## 2017 BOARD OF REGENTS ROSTER

### **Dan Lemyre, IOM, CAE**

Executive Director, Society for Biomaterials  
Association Headquarters, Inc.  
1120 Route 73, Suite 200  
Mount Laurel, NJ 08054  
856-642-4201  
dlemyre@ahint.com  
Term: 2014-2018

### **Jacqueline Lovejoy, IOM**

President  
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jlovejoy@dearbornareachamber.org  
Term: 2016-2018

### **Peter J. McNamara, IOM, CAE, J.D.**

President  
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PO Box 2337  
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603-224-2369  
pmcnamara@nhada.com  
Term: 2014-2018

### **Patricia A. Montgomery, IOM, CAE**

Managing Director, Executive and Board  
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American Society of Civil Engineers  
1801 Alexander Bell Drive  
Reston, VA 20191  
703-295-6101  
pmontgomery@asce.org  
Term: 2016-2018

### **Douglas OFlaherty, IOM**

South Carolina Director of Operations  
South Carolina Restaurant and Lodging  
Association  
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Columbia, SC 29202  
803-765-9000  
doug@scrla.org  
Term: 2015-2017

### **Robert Uhler, IOM, CAE**

Executive Vice President  
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Kansas City, MO 64141  
816-561-5323  
ruhler@westerneda.com  
Term: 2016-2018



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## AGENDA

OCTOBER 6, 2017

10:15 A.M. – 12:00 P.M. EDT

U.S. CHAMBER OF COMMERCE  
WASHINGTON, D.C.

- I. **Welcome and Introductions** Steve Clark, IOM, CFE, J.D.
- II. **Approval of Minutes** Steve Clark, IOM, CFE, J.D.
- III. **Nominating Committee Report** Carrie Stuart, IOM
- IV. **Analysis of 2017 Northeast Institute** Board Members/Institute Staff
  - A. Final Enrollment Report
  - B. Survey Results and Discussion of Institute Week
- V. **2018 Northeast Institute** Carrie Stuart, IOM
  - A. Create 2-3 Strategic Goals
  - B. Discussion of Week/Assign Regent Responsibilities
- VI. **Institute Staff Update** Institute Staff
  - A. Program Updates
- VII. **Other Business/Adjournment** Steve Clark, IOM, CFE, J.D.

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



## MINUTES

JULY 30, 2017

11:00 AM EDT

### BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

**In attendance:** Steve Clark, IOM, J.D., CFE; Carrie Stuart, IOM; Marvin Bond, IOM; Kate Conroy, IOM; Elizabeth Knowlton, IOM, CCE; Jacqueline Lovejoy, IOM; Peter J. McNamara, IOM, CAE, J.D.; Patricia A. Montgomery, IOM, CAE; Douglas O'Flaherty, IOM; Robert Uhler, IOM, CAE; Danielle Fitz-Hugh, IOM; Cheryl Kuhn, IOM; Donna Morris, IOM; Michael Smith, IOM, CAE, CPA; Karyn K. MacRae, IOM, CAE, CMP; Shelby A. Parish, IOM, CAE, CMP; Andrew Weller, IOM

#### I. Welcome and Introductions

Steve Clark, IOM, J.D., CFE welcomed everyone to the meeting and introductions were made.

#### II. Board of Regents Business

- Approval of minutes
  - The minutes from the May 18, 2017 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.
- Visiting Homeroom
  - Regents discussed the possibility of visiting each Homeroom.
- Importance of fundraising
  - The group was reminded of the various ways to fundraise and that all funds raised on-site go directly into the Northeast Regent Scholarship Fund.
- Customer service strategy
  - Regents discussed logistics involved with the daily customer service strategy.
- Additional business
  - Any remaining business was discussed prior to adjourning the meeting.

#### III. Class Advisor Welcome and Introductions

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



## MINUTES

JULY 30, 2017

11:00 AM EDT

### BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

#### 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. Overview of Week

The group reviewed the schedule of activities for the week, which included a detailed review of evening events. Regents signed up for various on-site responsibilities and classes to audit throughout the week. Final enrollment and scholarship numbers were given, as well as updates on social media, fundraising, and incentives.

#### VI. Joint Lunch

The group caught up over lunch.

#### VII. Continuation of Week Overview

Detailed discussion of the week of events continued.

#### VIII. Other Business and Adjournment

Any remaining business was discussed prior to adjourning the meeting.

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



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## 2018 SCHEDULE OF ACTIVITIES

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

### Sunday, July 29

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:** Gallen Hall  
3:30 p.m.–4:00 p.m. **Graduation Rehearsal** (*4<sup>th</sup> year participants*): 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 30

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 (*Break: 9:30–10:00 a.m.*)  
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 (*Break: 2:00–2:30 p.m.*)  
1:30 p.m.–2:00 p.m. **Class Advisor Meeting:** Faculty/Regent Lounge, Bartley Hall  
4:15 p.m.–6:15 p.m. **Elective Classes:** Bartley Hall, Individual Classrooms  
Evening **Class Dinner Option**

### Tuesday, July 31

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 (*Break: 10:00–10:30 a.m.*)  
10:30 a.m.–12:30 p.m. **Elective Classes:** Bartley Hall, Individual Classrooms  
10:30 a.m.–11:00 a.m. **Board of Regents Meeting:** Faculty/Regent Lounge, Bartley Hall  
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 (*Break: 2:30–3:00 p.m.*)  
1:30 p.m.–2:00 p.m. **Class Advisor Meeting:** Faculty/Regent Lounge, Bartley Hall  
Evening **Class Dinner Option**

### Wednesday, 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 (*Break: 9:30–10:00 a.m.*)  
9:00 a.m.–9:30 a.m. **Class Advisor 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 (*Break: 2:00–2:30 p.m.*)  
6:30 p.m.–10:30 p.m. **Graduation Ceremony and Big Bash:** The Inn at Villanova University

### Thursday, August 2

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 (*Break: 9:30–10:00 a.m.*)  
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. **2018 Northeast Institute Concludes**



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## 2018 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

### Class Advisors

Pete McNamara

### Silent Auction/Fundraising

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

### Industry Consultations

1. \_\_\_\_\_

2. \_\_\_\_\_

### Scholarships

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

### Institute Kickoff

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

### Big Bash

1. \_\_\_\_\_

### Volunteer/Faculty/Staff Dinner

1. \_\_\_\_\_

### State Photos

1. \_\_\_\_\_

### Customer Service Strategy (Optional)

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

### Social Media Strategy (Optional)

1. \_\_\_\_\_

2. \_\_\_\_\_



# NORTHEAST

## GEOGRAPHIC BREAKDOWN

### 2017 Northeast Institute

### 161 Attendees from 36 states and the District of Columbia

#### State, Number of Attendees, %

Arkansas,	3,	1.86%	Nebraska,	2,	1.24%
California,	3,	1.86%	New Hampshire,	3,	1.86%
Colorado,	1,	0.62%	New Jersey,	5,	3.11%
Connecticut,	1,	0.62%	New York,	6,	3.73%
Delaware,	1,	0.62%	North Carolina,	5,	3.11%
District of Columbia,	15,	9.32%	Ohio,	1,	0.62%
Florida,	4,	2.48%	Oklahoma,	2,	1.24%
Illinois,	4,	2.48%	Oregon,	1,	0.62%
Iowa,	1,	0.62%	Pennsylvania,	12,	7.45%
Indiana,	4,	2.48%	Rhode Island,	1,	0.62%
Louisiana,	3,	1.86%	South Carolina,	3,	1.86%
Maine,	3,	1.86%	South Dakota,	1,	0.62%
Maryland,	14,	8.70%	Tennessee,	1,	0.62%
Massachusetts,	10,	6.21%	Texas,	9,	5.59%
Michigan,	4,	2.48%	Virginia,	31,	19.25%
Minnesota,	1,	0.62%	Wisconsin,	1,	0.62%
Mississippi,	1,	0.62%	West Virginia,	2,	1.24%
Missouri,	2,	1.24%			

#### Top Increases Since 2016:

Maryland	+7
California	+2
Florida	+2
Maine	+2
New Hampshire	+2
Texas	+2
West Virginia	+2

Most Attendees in 2016, Virginia with 39

Most Attendees in 2017, Virginia with 31

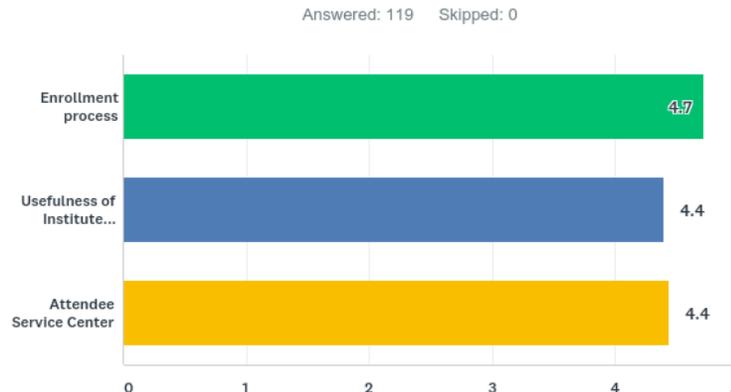
2017 Northeast Institute Attendees





## ATTENDEE SURVEY RESULTS AND FEEDBACK

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



#### Additional comments about registration and communication\*:

- Downloading process for handouts was cumbersome. There should be a way to download all handouts for each class at once, rather than having to individually download each document.
- The months leading up to the Institute are insanely busy for me. First year communication was awesome, but second year, some of the most important reminders were embedded in emails that didn't clearly say what the important info in the email was. My fault as I should have been paying better attention to these emails, but it might help to have subject lines reflect important deadlines for lodging, etc.
- Registration and using the Attendee Service Center was very easy. And communication was very clear and helpful.
- I could not find where to change electives on the attendee service center.
- I loved the app!
- Communication to first year attendees was very poor. More detail should be given about registration that day on campus, registering at dorms, homeroom, etc. Should also tell attendees that no handouts are given and attendees should print them out. Class Advisor was not helpful and could not provide any answers. Bus schedules were not given out and timing of events not communicated well. In app the break times should be noted so attendees know if they need to handle work issues they can schedule accordingly and speakers/advisors should know break times as well.
- I don't recall getting an official acceptance notice. I put in my application which felt like it wasn't a definite that I was in, simply applying to be. A confirmation that I was in would have been helpful.

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



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## ATTENDEE SURVEY RESULTS AND FEEDBACK

- I didn't see the bus schedule posted in the attendee service center. I could have overlooked it. This was technically my 2nd year, but my first time at this location and there was not a lot of communication from my adviser regarding transportation, places to eat, things to do in the area. At Madison it was a much different experience. I received a map, the Facebook group was and still is very active, the communication leading up to was AMAZING.
- The small link for the Attendee Service Center was somewhat buried in a long message. More attention to it would be helpful in the future - I thought it hadn't come, so ended up scrambling on my last day in the office to download everything.
- New parking or changes to the location would be helpful.
- It would be great if the attendee service center would allow you to do a bulk download of all the handouts/files provided. Its quite tedious clicking through 50+ files to download.
- Some instructors didn't get their material up ahead of time, not a big deal, but it does help for those of us who like to print things out in advance.
- I never use the attendee service center - too difficult to get/remember password.
- Communication from my class advisors prior to attending institute were minimal.
- It would be helpful to have instructions on how to actually get to Jackson Hall/Bartlet Hall when you arrive. The campus is incredibly confusing for someone who has never been there before and I know several people got lost (particularly those relying on public transportation).
- It would be helpful to receive reminders to enrollment and/or apply for scholarships with deadline information.
- Could have used a reminder e-mail about the deadline on the Radnor Hotel.
- I did not appreciate the "reply all" approach my class leader took when trying to coordinate the group dinner and when trying to figure out what our preference for social media was. I think a survey monkey or other similar tool would have been much more efficient and less hassle in my inbox.
- Always goes very smoothly.
- Our class advisor did a great job communicating information beforehand.
- Signage directing participants to the appropriate buildings for check in and dorms would be helpful to first year students.
- I would prefer the communications to be streamlined. It felt like I was bombarded with information about Institute in the weeks prior. The amount of information was fine, but it came in so many different e-mails. It was confusing.
- Very helpful; allowed me to make a change in electives on the first day, as well.

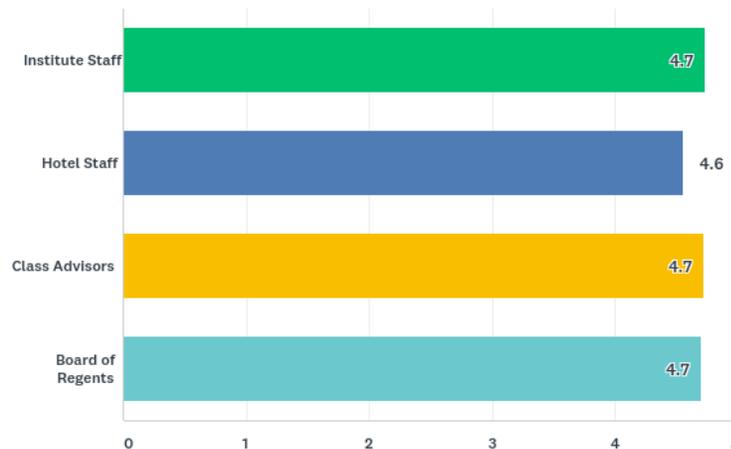
*\*ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.*



## ATTENDEE SURVEY RESULTS AND FEEDBACK

### Q5 Customer Service

Answered: 119 Skipped: 0



### Additional comments about customer service\*:

- The class advisor didn't have the answers to the important questions and was instead focused on organizing a very expensive 100\$+ dinner that was executed very poorly.
- Everyone is very friendly, but sometimes it seems that Institute staff, class advisors, and board of regents are not on the same page.
- I stayed at the Wayne hotel, which was lovely. I felt that my class advisor could have been better informed. She didn't have the answers to a lot of questions, but her follow up was good. I didn't interact with the Board of Regents.
- The instructions for dorms sent me to the wrong location first and then I was sent to the actual dorm site to grab my key and get my room assignment. A little more information ahead of time could help those who stay in the dorms. Especially if they are not first year, but staying in dorms for the first time.
- Everyone was very helpful and friendly.
- Very impressed with the level of attention from the Board of Regents throughout the week and their expression of gratitude on the last day.
- I love my class advisor and wish she was our class advisor for the rest of the 3 years!
- A surprise from our class advisor, ice cream!
- It appeared that class advisors had a lot of detail to impart though they were given a lot of autonomy in how they delivered the information to their respective classes.
- For those arriving earlier than 2pm housing check-in, could a solution be devised to store luggage?

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## ATTENDEE SURVEY RESULTS AND FEEDBACK

- The hotel staff was very confused and didn't have answers to my questions. I was very disappointed with their lack of knowledge of our event upon my arrival.
- Advisors were terrific!
- I stayed at the Best Western King of Prussia- about 5 miles from Villanova. It is a newly renovated hotel, less expensive than the Radnor, which was full by the time I called. I also tried the Bradley Hotel recommended by the Radnor, that was also full. You could add the Best Western as another room block option in the future as the Radnor staff told me our conference completely fills their hotel. Free breakfast, pool, etc., it was really a very nice alternative.
- I am unable to answer the question on the Board of Regents as I have not received any follow up about this incident so I am unable to give a fair assessment. I am confident they are dedicated and professional.
- IOM is presented as a professional learning program, however, when I was greeted, it was by people wearing shorts, t shirts and sneakers telling me how they had bought beer for flip cups in the dorm. The level of professionalism carried through the entire week.
- My organization spent a lot of money to send me to IOM and while the content of the classes is amazing, the whole "this is adult summer camp" really cheapens that experience. It isn't summer camp - it is professional development and the staff should act in a professional manner.
- It would have been nice if our class advisor had given us her cell number via email ahead of time - we were late and did a lot calling around to let people know - it would have been easier to let her know!
- I didn't really have interactions with the Board of Regents.
- Our Class Advisor this year, was fabulous!!!! I would certainly recommend him for future classes.
- I did not appreciate the "reply all" approach my class leader took when trying to coordinate the group dinner and when trying to figure out what our preference for social media was. I think a survey monkey or other similar tool would have been much more efficient and less hassle in my inbox.
- I found it very disruptive when the Regents came into class for announcements. The timing could not have been worse and disrupted the flow of the discussion. Any comments/thanks/etc. that they wanted to share should have been done at either the Big Bash or at a pre-arranged time with the instructor.
- When I arrived at the dorms my room did not have any linens. I asked the staff person at check in and they sent someone down and left everything that was needed.
- The staff was wonderful. My class advisor was wonderful, and very helpful.
- Everyone is wonderful! Great staff and great volunteers clearly working together.
- Board of Regents seem to be those that do not do much.
- I had a hotel issue due to a mix-up on my end. The staff was incredible in resolving it for me, especially Ana at the front desk.

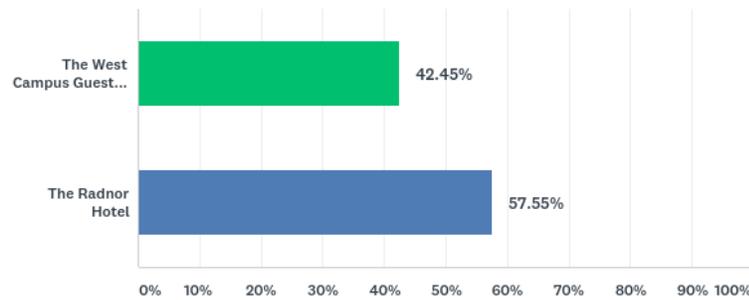
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## ATTENDEE SURVEY RESULTS AND FEEDBACK

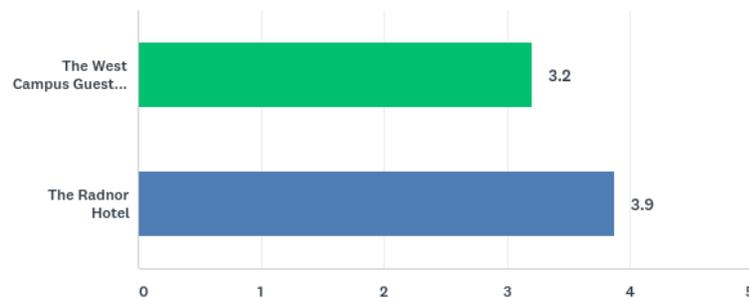
### Q7 Which hotel did you choose to stay at?

Answered: 106 Skipped: 13



### Q8 How would you rate your accommodations?

Answered: 115 Skipped: 4



### Additional comments about accommodations\*:

- The Radnor needs major renovations. My room was musty, humid, and incredibly dusty. It lacked tabletop/counter space and closet space. The wallpaper was peeling off the walls and there were visibly dusty cobwebs hanging from the ceiling. The air conditioning did nothing to help with the humidity in the room - it was either too warm or too cold. For a hotel of its kind, I also expected some kind of mini-fridge in the room. As convenient as it is to campus, I will not be staying there again.
- Hotel needs updating - really bad wifi and cable.
- I did feel a bit isolated since not many of my classmates had rooms there, so it would be nice to get a list of who is staying where before institute week. It would also be nice to have bus schedules for places other than the Radnor or dorms.
- This was the second year in a row that the room was damp and smelled of mild-dew. My bed sheets were wet to the touch and it was hard to sleep. I am not staying there next year.

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## ATTENDEE SURVEY RESULTS AND FEEDBACK

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- The room was so frigid, I turned the oven on and opened the door to try to heat the room every morning and night. This in addition to completely turning off the AC during my 4 night stay. The AC was set to a temperature below 50\* when I arrived.
- I believe there is also a Marriott nearby that should be included in the block of options if possible.
- I believe I got a respiratory disorder from the hotel air conditioning.
- You might want to warn new attendees that if they stay in the apartments that taxi/uber can't go all the way in. I was prepared luggage and shoe-wise, but not all were and it was quite a haul.
- It was freezing in the rooms... not enough blankets to stay warm! but overall it was very basic but nice.
- Rooms were cold and damp.
- I can now say I've checked off a box-stayed in a dorm. Won't do it again. No issue with no TV, cleanliness was less than desirable.
- Bus schedules should be given out at registration as well as better directions on where everything is located. The first day many first year students were lost and did not know how to get from West Campus to breakfast and/or classrooms.
- The facility was clean, very basic and provided pool tickets to the fitness center across the street.
- The dorms should not be an option. Very isolated. Felt like the only person in the building. Worst part of my experience. Would have moved if I could have. Very Bad.
- Radnor Hotel was fine but nothing special. I could hear every door open and shut down the hallway all night long.
- My bedding became wet (from humidity?). The dorms seem rundown and dirty.
- They also messed up my bill and had I not inquired I would have been overcharged roughly \$250.
- There originally was a wait list to get into the Radnor, potentially more rooms are needed for next year. I was able to squeeze in and am glad. It seems as though after hearing from those in the dorms that they weren't assigned efficiently with many being in multi room suites with only 1 person. It appeared that those who signed up to be in the dorms anticipated not being there alone.
- Since I was in the dorms last year, Lord Have Mercy, the Radnor was PERFECT!!!! Seriously there was not one issue. Great hotel.
- Bed bugs ate me alive. Still recovering.
- The service staff was not as good as prior years.
- Very convenient.
- The breakfast is really expensive.
- The Institute website provided a code to book at The Radnor online, but when I tried booking online using the code it said they didn't have any rooms available (about 2-3 months before Institute). Luckily I called and they said the rooms weren't available online because they were holding for rooms for the room block, and I was able to book via phone. I would recommend not including the online code if we won't be able to book online to avoid confusion and people potentially not booking at the hotel thinking it is full.
- OK for the money and convenience. Not a great hotel.

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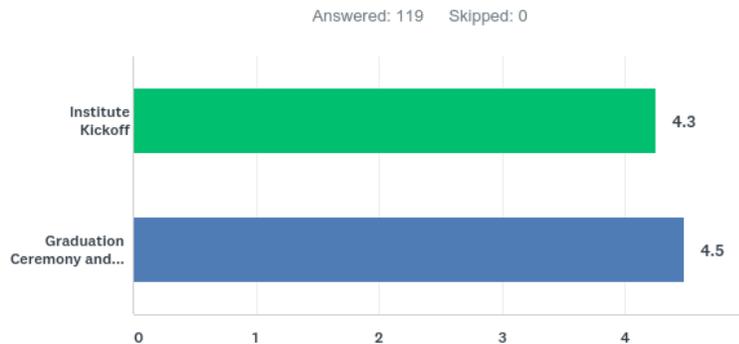
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## ATTENDEE SURVEY RESULTS AND FEEDBACK

- Rooms should come with a refrigerator and microwave by default.
- It's always an adventure in climate control at the dorms.
- Humidity control is lacking. Everything feels damp by the end of the week.
- Being in the dorms and in a 4 person room, it would have been nice to have a roommate or two. I heard from several people that chose the 4 person rooms but ended up being alone.
- Not a big fan of the Radnor - wifi is spotty. Hotel is more expensive than nicer accommodations 5 minutes away so I stayed elsewhere until the last night.
- I seen a mouse running around in the dining area in the Glenmorgan. Brought it up to the bartender & manager.
- The Radnor has great staff, but is a bit dated. I wish there was a pool, as well. I know there are not a ton of options, but they do need an upgrade/update.
- Mildew on Couches.

### Q10 Please rate your experience at the following Institute events.



### Additional comments about events\*:

- Buffet was not well maintained at the kickoff.
- Would have been nice to know the Big Bash was cash only (plus drink tickets). This had changed from last year and some people were not prepared.
- As mentioned before: We didn't know the Institute Kickoff was a sit down affair with a program. The title implies an open reception, similar to a barbecue.
- The band was a lot of fun at the Big Bash.
- Speaking from an event planner's perspective, I wouldn't serve raw onions on a salad at a business event.
- Both fun events but the food at both was awful. (Better at the kickoff than at the grad ceremony. I couldn't even cut the piece of meat I was given.)

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## ATTENDEE SURVEY RESULTS AND FEEDBACK

- These are fun events. The music was a bit loud when it started. I personally would prefer that they do something instrumental and classy if they play during the time that people are still eating. The band was super fun though.
- HUGE improvement on the food at both events this year. Thank you!
- Band is great!
- I broke my shoe at the Big Bash from all the dancing I was doing!
- Kickoff was fine.
- The Bash itself was great. The hotel staff was a bit noisy during the speeches and they seemed lost while bringing out the plated meal.
- While I like live bands, it was hard to talk at the tables without screaming at each other at the Big Bash.
- We would like to have 180 play the Graduation Ceremony this upcoming year.  
<http://180music.net/main.htm>
- As a new student, these were difficult as other classes clearly had longer and more established relationships.
- I was a bit confused by what time we should arrive. I know the schedule indicated 6:30, but knowing the flow for the evening would have been helpful, and I didn't remember the recognition ceremony being before dinner.
- Food at Big Bash was disappointing. Half of table was great, half was super tough.
- Hotel not having ability to take card for bar was less than ideal.
- The music at the big bash was so loud that I couldn't hear anyone that wasn't sitting directly next to me. And, I am under 50 and was sitting on the opposite side of the room.
- Well done. The kick off didn't go to long after a long day of travel and let you mingle/network as long/late as you wanted. Also appreciated the agenda/timing of the big bash where there were multiple options to go as you preferred.
- The events were great- just an FYI. The venue for the Big Bash doesn't have an ATM and does not accept credit cards. Numerous attendees were looking for ATM. You could communicate to attendees in advance to bring cash.
- Outstanding! Had a blast.
- The kickoff food was MUCH better this year. I'd prefer if there was assigned seating per class at the kickoff as people get there at all different times. For the Graduation Ceremony, PLEASE have people hold their applause until the end. You can't hear the names being read, which isn't fair to your graduates who worked for that recognition.
- Both valuable networking and relationship building events. I have built what I believe will be life long relationships.
- Did not like the food. Was more formal than the Big Bash - maybe do networking games to interact more.
- I missed the class picture, (was on the patio); figure out a way to inform the classes when they are taking the photo.

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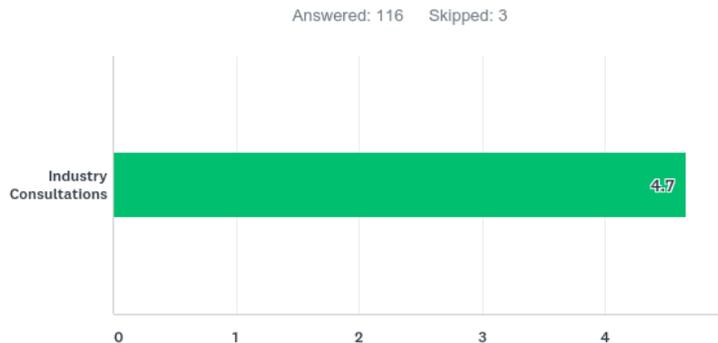
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## ATTENDEE SURVEY RESULTS AND FEEDBACK

- I arrived late to kickoff. Food was good!
- The food was horrible.
- Parking was an issue for those who drove themselves.
- The Big Bash is fabulous. I loved it all 4 years.
- Class speaker was amazing.
- It would be great to have a keynote speaker who wraps up the week.
- I would have preferred an earlier bus back to the hotel. I thought there was supposed to be a bus at 9:30, but when I went out, the driver said he was not leaving until 10:00.
- The food and service was very mediocre this year, compared to last years. Seating for our class 2-1 was not adequate, only 2 tables.
- Kick off had much better food and the games were fun.
- The Big Bash next year needs to have the 180 Band! IOM 2018 Classmate Frank Squillace's band.
- Would have been nice to know it was a cash bar at the big bash.
- Recognition of the graduates was well done and the band rocked it!
- Not taking digital payments for drinks limits time wanting to spend there. Venue for Institute Kickoff feels too small.
- I was not able to attend either event due to travelling with my young daughter, but I did hear positive feedback from my classmates about both.

### Q12 Please rate your experience participating in industry consultations.



### Additional comments about industry consultations\*:

- My paperwork got lost and by the time we figured that out, there was no time for a consult. I was offered a phone consult afterward, so that's good, but it would have been great to have my consult during the week.
- There is not enough time allocated for industry consultations. This is a such a valuable aspect of Institute -- please schedule these when participants have more free time instead of at lunch or on break. Or maybe offer them by phone the week following classes. Anything to allow more access to this resource.

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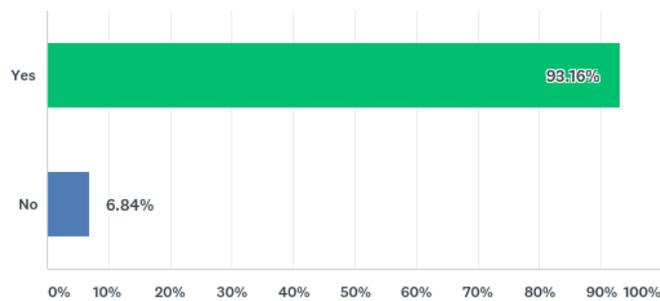
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## ATTENDEE SURVEY RESULTS AND FEEDBACK

- It would be great to have the option to sign up for consultations online or via the app. I had a hard time chasing down the paper form.
- I don't feel like I received much info on these.
- This was one of the most helpful facets of IOM for me. I went back home and immediately started working toward implementation of the guidance that was given as part of the consultation.
- A very worthwhile experience!
- Thank you so much for offering this opportunity!!
- There wasn't anything specific at the point that I felt needed an in-depth discussion. I greatly appreciate the opportunity if needed.
- Liked the new schedule this year - allowed me to get home at a decent hour.

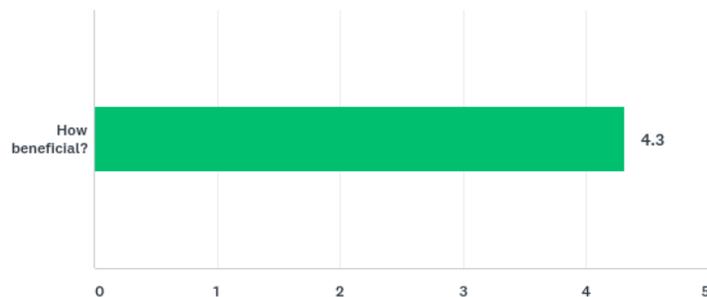
### Q14 Did you download the 2017 Northeast Institute App?

Answered: 117 Skipped: 2



### Q15 If you downloaded the app, how beneficial was the app to you?

Answered: 116 Skipped: 3



### Additional comments about the app\*:

- It would be great to have a personal ID that would allow your schedule to be automatically uploaded rather than having to create it inside the app.

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## ATTENDEE SURVEY RESULTS AND FEEDBACK

- Also, having attendee cell phone numbers in the contact information rather than work numbers would be fantastic!
- Class evaluations were not the easiest on the app.
- If you filled it out on an android then went back in, it wouldn't always recognize that you had filled it out already.
- The app wasn't as useful as the printed class schedule that was given to me at registration - and I'm someone who is very comfortable with technology and is the IT person for my office. I found it more useful prior to arriving at Institute and the only reason I used it during Institute was to fill out class surveys.
- App would be better if individual schedule was pre-loaded once we logged in. Had to go back to attendee service center, find the classes and then star within the app.
- Great app. Very elegant and simple. I've already shown it to my staff as alternative to the app we use now.
- Also appreciated having a small print out of my courses which I folded up and put in my nametag holder.
- I used it once to look at classes and the bus schedule, but then didn't enter in my own class schedule. I did hear everyone say they liked it--I just didn't use it.
- Superb improvement from last year---very useful and helpful!
- The documents in the app did not look and function the same as they did on the service center page. I often got frustrated and went to the service center instead to open the documents I needed.
- It was fantastic!
- Would be nice to have personal agenda as default.
- Very Useful and nice upgrade from previous guidebook.
- Certain classes the presentation wasn't downloaded prior to arriving or before class began.
- Should note break times.
- Very user friendly. The only difficulty encountered was failing to upload photographs.
- Attendees can complete surveys more than once and downloading documents from your phone isn't the easiest.
- Such an improvement over last year. Much more user friendly and easier to navigate.
- I used it for the class surveys but otherwise didn't utilize it. I overlooked that it was available as a tool (prior to actually being asked to use it after the first class). It could be promoted more as an asset or tool.
- I know you hate to hear this, but last year's app was better. It separated classes in the directory, so it was easy to look people up. Endless hunting and giving up with this app. Downloading my schedule was cumbersome; it went back to the beginning after each entry. Awful. Also, last year there was a directory for staff & volunteers, faculty, and attendees. I really liked this; we didn't get any information this year about staff or volunteers which I think is a shame. I know the 2016 app was expensive but it was exceptional! Overall I'm appreciative of the app and found it helpful.
- Better than last app.

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## ATTENDEE SURVEY RESULTS AND FEEDBACK

- I loved the convenience of filling out the surveys on the app, but I know a lot of people forgot to do it. Maybe send a reminder via the app after each class to remind people?
- Once you set the "personal agenda", the "personal agenda" should stay set so that when you are looking at the calendar of events, it should default to that option. But, it would always show ALL the classes every time I opened the app and I had to always select the "personal agenda" option to only see what was relevant to me.....just some extra steps that could be avoided.
- Would be helpful when choosing electives to know who is teaching the class and what classes we've taken in years past.
- It didn't pull my schedule out so I just had an overall schedule.
- It would really great if the app synced up with the registration information. For example, I could go online the resource center and get my class schedule but I had to recreate my agenda on the app.
- Need to not depend solely on the app for after class surveys. It also wasn't made clear to us that that was the only place to do the surveys until the second day of classes. Year One's especially need all the help they can get. Maybe a notice, email, or announcement letting them know how to access the surveys. That would be very helpful.
- It would have been nice if you could have also completed the teacher evaluations online. I would have made more comments if I didn't have to them in by my cellphone keypad.
- I mostly used the attendee service center and not the app. I did like being able to complete the surveys for each class through the app.
- I would like to see 5-7 minutes at the end of each session to complete the class surveys.
- It would be nice if the class handouts available on the app mirrored the handouts available in the Attendee Service Center. Many of my classes only had a couple of the handouts in the app but many more online.
- I prefer using the paper surveys. I had a really hard time downloading the app, I keep my PW at home and forgot it. I would have like to provide feedback about the speakers.
- I only used it for the evaluations and it was VERY useful.
- I really liked the app and recommend that you use it again next year. It would have been most helpful if the room numbers had been loaded into the app as well as the instructors name being loaded into the app. The app should be non-stop shopping. Should never have to reference a sheet of paper to find the room number or my instructors name!
- This is a great way to put all of the info at our finger tips. Great way to do the course evals as well!
- I found it helpful to have access to the app, but I did not find the surveys/feedback forms for each session to be user friendly- to provide better feedback, I would prefer access on a computer or hard copy rather than on my phone.
- Having the class surveys on the App was a lot easier.

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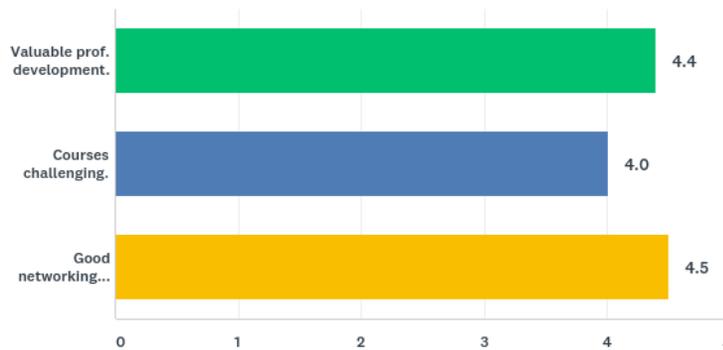
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## ATTENDEE SURVEY RESULTS AND FEEDBACK

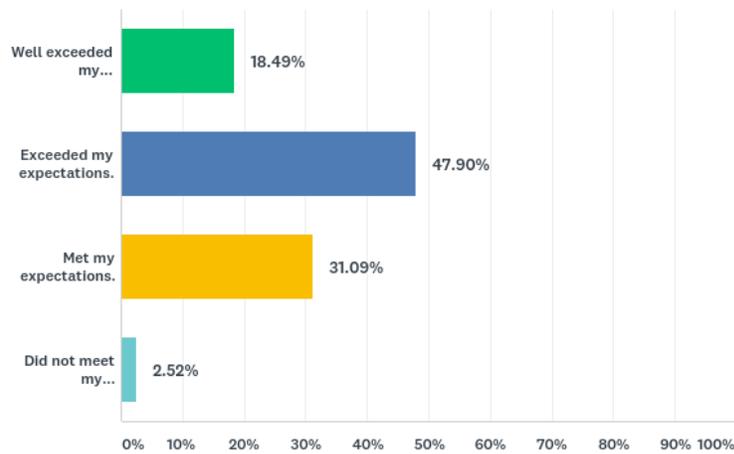
Q17 Rate to what degree you agree with the following statements.

Answered: 119 Skipped: 0



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

Answered: 119 Skipped: 0



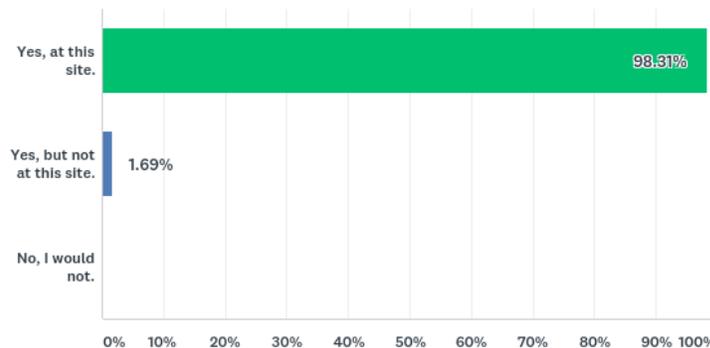
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## ATTENDEE SURVEY RESULTS AND FEEDBACK

### Q19 Would you recommend Institute to other nonprofit professionals?

Answered: 118 Skipped: 1



#### Additional comments about Institute\*:

- I love NE Institute and look forward to attending each year. I only wish we could meet more than once per year!
- All week, we were told that class surveys are "online". However, they were actually in the app. Please be aware that "online" and "in the app" are not the same thing. I believe this is why you had a hard time getting people to complete them. I wish the surveys had been online, because it would have made it easier to access. Perhaps put them in the Attendee Service Center in addition to in the app?
- Last year, I attended West Institute. The silent auction was in the app and it got great participation throughout the week. It was actually the only reason I used the app last year. Maybe think about doing this next year?
- One of my suggested would be a best practice sharing session with professionals in similar organizations. Associations professionals meet with other association professionals. It would be helpful to talk directly with those people. Maybe a round table type of session with questions at each table to discuss issue specific to the type of organization you are part of.
- 4th year would like Room 1010.
- We would like Franks band for the bash.
- Slightly more detailed description of the elective classes. It is not always easy to see if the class is better suited for chamber or associations or both.
- Thank you for a great first year! I was so sad when the week ended, and I am very much looking forward to returning next year.
- I would take more time to evaluate instructors. My instructor for Unleashing the Leader, while a nice guy, did not really connect with the topic. He even said he's not that great of a leader.

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## ATTENDEE SURVEY RESULTS AND FEEDBACK

- I really loved it. Best professional development I have ever done. I found about half of my classes a little basic for my level (Executive Director) but I still took something from each one.
- Since the focus of Institute for me is professional development and my path to becoming a CAE, it would be nice for me to have the opportunity to talk with someone about my own career pathway, the industry, and the CAE. Instead of an Industry Consultant to help me work out job related challenges, something along the lines of a professional development consultant and coach would be helpful. Thanks so much to everyone who makes this training possible. I am grateful for the opportunity to learn from such well respected industry professionals, and to be a part of something that is impacting the non-profit so positively.
- This was a great experience! You could tell that the instructors enjoyed sharing their knowledge and their stories were very helpful to my understanding, especially with topics such as law and legislation.
- My only disappointment this year is that too many instructors were unable to fully cover their topics /presentations and left us with handouts to simply read on our own. I expected full coverage of course objectives, not reading materials.
- On the app, please list the name of the file. Some sessions had a lot of files and it was hard to figure out which was which with no file name.
- It might be a good idea to mix up the two classes in the second year since all will merge at the third year. Otherwise, in the third year you're meeting some all new people.
- I can't wait for next year!
- I really enjoyed this year much more than last year. The friendships that are building from year to year are getting stronger and that "net" is widening. Not sure about the new class times... going until 6:15 one night and having no afternoon off. We made it to the airport fine to fly out Thursday afternoon, but then were delayed because of weather (that can't be helped) I finally arrived home after 2 am. I missed not having the afternoon to actually get to site see, etc. Didn't attend the class dinner, \$40 for heavy appetizers was a bit much.
- I thought I would enjoy the new schedule better, however, once actually doing it-days seemed to feel much longer. I am from the Midwest and the only flights that leave are later Thursday evening so getting out early that day did not really benefit myself (however I'm sure it did for others traveling).
- Rooms were cold and there are no windows in the basement which I think has a factor on long days.
- I would like to see some time put aside at lunch for a roundtable discussion of those Chambers who conduct the YEA! Program, with maybe a second box lunch for us and a separate room to use. I heard that there were several Chambers there who have YEA along with myself and this should be done so that Chambers from all 4 classes are invited. It would be good to learn from each other as to what worked well for each of us and what needed to be improved upon.
- Snacks offered at break need to be appropriately sized for the group. Never enough diet soda and many times if your class was 5 minutes late there was not any food left.
- Thank you!

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## ATTENDEE SURVEY RESULTS AND FEEDBACK

- I feel that Institute needs more practical learning experiences and to teach best practices.
- I learned more during the 2 hour elective on filling out a 990 than any other class.
- Everyone involved in IOM is so enthusiastic and helpful and I really appreciate it! I like the flow of the days, and the class dinner is fun. As far as course work goes, I don't think speakers should force themselves into making classes interactive - this gets awkward. I don't mind being "talked to," especially if the speaker has expertise in a certain area. Tell me what you do best and how I can do it, too!
- Thanks for changing the times so that we could get out early on Thursday - that made a big difference. Would suggest having the late day on Tuesday, however, since there is nothing scheduled for that evening. I would also continue to strive to have content and educators from the Association world and not just Chamber or State Association - but national association. A lot of the content is geared towards state chambers and associations - a lot is still helpful for nationals, but you have to work harder at connecting the dots.
- encourage more group sharing. A lot of instructors seemed to feel pressured to get through the material and didn't encourage a ton of group sharing.
- Our class was in the basement building with no windows, was colder than any of the other rooms, too small for our class, and the electric plugs were hanging out of the walls. Not exactly ideal, but also not really within control of IOM staff.
- I really enjoyed my 4 years at Institute! this was very beneficial to my personal growth and my Chamber. Thank you!
- As a first year, and as discussed by myself and some of my classmates, it would have been nice to have an 'excursion' available Tuesday afternoon/evening. Acknowledging that it would be a pay out of pocket expense -- I would have enjoyed a chartered bus back into Philly to do a bit of sight-seeing or dinner in the city? While it worked to connect with those who planned to do so anyways, potentially a structured event organized with a tourism group would have been nice.
- The days were long, breaks were much appreciated but understandable in order to get in all the material in a short time frame.
- Great job to the teams who helped plan it all!
- I guess I just put the "facilitated discussion" idea in the wrong box! See my previous answer.
- I felt that we were in some classes too long and that the faculty had to stretch out the information to make it take up all the time they had. I feel some classes could be made shorter and maybe get more classes into a day.
- The Wi-Fi at Villanova is very challenging. I had a Surface Pro tablet and I would set up a profile yet never get the credentials texted to my Verizon cell number to finish the set up and use the wifi very annoying. Awesome four years---sad it is over!
- For 2018, the graduating class requests Frank's band (180) to play.
- I think it may be helpful to incorporate diversity and inclusion training or info in a class. It's a hot topic in the industry and our field would do well to reflect those that we serve. Also diversity and inclusion is in a lot of the asae materials.

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## ATTENDEE SURVEY RESULTS AND FEEDBACK

- Next year our class would love to be in room 1010 again, it worked very well for our group! The temperature in the rooms was much better this year (last year was very cold). We would love for 180 (a class member's band) to play our big bash next year! I also appreciated the schedule change, the longer first day was very doable and the shorter last day made travel so much more convenient!
- Overall I feel that the Institute was amazing! I learned tons...more than my head can keep in. Very pleased with the education aspect. A few logistical things could be worked on. For first year students, especially those who are not familiar with public transit, it might be helpful to create some form of content (detailed description, video, slide show) that gave a more in-depth look at what to expect, how to get around, where to go at the airport, etc. I know it could all be found online but I think it would go that extra mile to produce something that visually explained or explained in detail the little things. I wasn't quite sure what direction to go once I got off of the regional rail...I had the map but it wasn't super detailed. Again, I know I could have used google maps but it's that extra mile to make the experience as smooth as possible that I aiming for with this request. Maybe some signage or greeters at the rail and at the on campus apartments. Touch points make all the difference. Ok, I've said enough.
- I had heard that there was money left for scholarships.
- I wonder what is the criterion to receive more than partial (\$150) in scholarship for a non-profit organization.
- The lunch facility at Villanova is not stellar. Options are limited and space provided is minimal. In addition, I felt like the teachers at the Madison location helped guide conversations between peers, so there was more of an opportunity to share personal experiences and gather advise from other classmates. At Northeast, it was rarely that open. Teachers would say "no more questions" because we have to get through the PowerPoint they made. To me, personal experiences are worth more than a PowerPoint. However, I still learned a lot and appreciated what every teacher provided. Institute is a great professional development tool that I plan to suggest to all my colleagues. Thanks!
- Overall the speakers were great - some of them you have year after to year - but hearing the same stories over and over and having people joke about them is annoying.
- Overall, I adore institute. I do have one issue thought. I appreciate the integrity that the program is trying to maintain, and appreciate that class attendance is critical. However, being told repeatedly that if you miss class there are no excuses, if you are throwing up, just bring a bucket (that story was told) treats me like a child rather than a seasoned non-profit professional. There are constructive ways to deliver the message without patronizing the attendees.
- It was an amazing time again at IOM. I would suggest allowing time to take the class surveys at the end of each class. I did not have time to complete 2 surveys.
- More core classes and less electives; maybe get it down to 3 days.
- I was disappointed that many of the instructors didn't have more break out sessions. They just lectured for hours. Don't they know this is torture?
- Overall, an excellent experience and I am looking forward to the next three years. I recommend bringing in more outside instructors for the courses that are not association/chamber specific -

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## ATTENDEE SURVEY RESULTS AND FEEDBACK

e.g., leadership and negotiation. I would be willing to pay more for the program in return for higher quality instructors for such courses.

- The best year was year one when everything was new. Through the years it gets a bit repetitive but I really benefited from doing it and will encourage anyone in the business to do it.
- You may or may not have control of the classrooms that we are assigned. The basement classroom was not very conducive to learning. I spent the bulk of my week in that classroom. There was no control of the temperature and it was freezing the entire week. I went upstairs for an elective and was shocked at the difference between the rooms. I do realize that room assignments may be out of your control.
- How can I volunteer next year?
- Any thought to inviting Alumni to the networking reception? Or having a way to have us back and engage with each other and new students outside of volunteering or board service?
- Overall this was once again a great experience.
- Would not recommend having Johnathan Rick back as a speaker, very into his opinion with our group and didn't have the ability to cope when you didn't see things his way.
- IOM class of 2018 would like to have room 1010 as our homeroom and core class location again!
- Class dinners: I would make sure the dinners are a reasonable price. Folks need to remember that there are many small organizations attending and spending \$75 on dinner is hard to justify. Also, please have skim milk for the tea at breaks!! :) The Northeast Institute should do more Association networking like the Winter Institute does. There should be a more focus on connecting the Association folks. I feel like at Winter I met more across classes and Northeast is more kept to the class you are with.
- Class dinner was unnecessarily expensive.

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