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## 2017 BOARD OF REGENTS ROSTER

### CHAIR

**Kelle Marsalis, IOM, CCE**

Vice President, Strategic Initiatives  
Dallas Regional Chamber  
500 North Akard, Suite 2600  
Dallas, TX 75201  
214-712-1901  
kmarsalis@dallaschamber.org  
Term: 2016-2017

### VICE CHAIR

**Brad Lacy, IOM, CCE**

President and CEO  
Conway Area Chamber of Commerce  
900 Oak Street  
Conway, AR 72032  
501-329-7788  
brad@conwayarkansas.org  
Term: 2016-2017

### PAST CHAIR

**Tony Vedda, IOM, CCE**

President and CEO  
North Texas GLBT Chamber of Commerce  
3824 Cedar Springs Road, Suite 429  
Dallas, TX 75219  
214-865-6516  
tony.vedda@glbtchamber.org  
Term: 2016-2017

**Alysia Bell, IOM**

Director, Education Business Coalition  
Los Angeles Area Chamber of Commerce  
350 South Bixel Street  
Los Angeles, CA 90017  
213-580-7535  
abell@lachamber.com  
Term: 2015-2017

**Jason E. Camis, IOM**

President and CEO  
Gardner Edgerton Chamber of Commerce  
109 East Main  
Gardner, KS 66071  
913-856-6464  
jason@gardneredgerton.org  
Term: 2015-2017

**Ryan Evans, IOM**

President  
Utah Solar Energy Association  
14018 Old Saddle Road  
Draper, UT 84020  
801-930-0346  
revans@utsolar.org  
Term: 2016-2018

**Tony Felker, IOM, CCE**

President and CEO  
Frisco Chamber of Commerce  
6843 West Main Street  
Frisco, TX 75034  
972-335-9522  
tfelker@friscochamber.com  
Term: 2013-2017

**Lisa Hermes, IOM**

President  
McKinney Chamber of Commerce  
400 West Virginia Street, Suite 100  
McKinney, TX 75069  
972-542-0163  
lhermes@mckinneychamber.com  
Term: 2015-2017



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## 2017 BOARD OF REGENTS ROSTER

### **Ray Hernandez, IOM**

President  
Lewisville Area Chamber of Commerce  
551 North Valley Parkway  
Lewisville, TX 75067  
972-436-9571  
ray.hernandez@lewisvillechamber.org  
Term: 2013-2017

### **Jim Johnson, IOM**

President and CEO  
Lufkin/Angelina County Chamber of Commerce  
1615 South Chestnut Street  
Lufkin, TX 75901  
936-634-6644  
jjohnson@lufkintexas.org  
Term: 2016-2018

### **Russell Lahodny, IOM**

Vice President, Local Chamber Relations  
California Chamber of Commerce  
1215 K Street, Suite 1400  
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916-930-1241  
russell.lahodny@calchamber.com  
Term: 2011-2017

### **Heidi Peterson, IOM**

Manager, Marketing and Membership  
Wyoming Taxpayers Association  
200 East 8th Avenue, Suite 203  
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Term: 2015-2017

### **Jennifer Reiser, IOM**

Chief Operating Officer  
Billings Area Chamber of Commerce  
PO Box 31177  
Billings, MT 59107  
406-245-4111  
jennifer@billingschamber.com  
Term: 2016-2018

### **Katie Stice, IOM, ACE**

Vice President of Core Services, Regional  
President  
Greater Coachella Valley Chamber of Commerce  
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La Quinta, CA 92253  
760-564-3199  
katie.stice@gcvcc.org  
Term: 2016-2018

### **Gene Terry, IOM, CAE**

Executive Director, American Society of Hand  
Therapists  
Association Headquarters, Inc.  
1120 Route 73, Suite 200  
Mount Laurel, NJ 08054  
856-380-6840  
gterry@ahint.com  
Term: 2016-2018



## AGENDA

OCTOBER 6, 2017

10:15 A.M. – 12:00 P.M. EDT

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

- |      |  |                               |
|------|--|-------------------------------|
| I.   | <b>Welcome and Introductions</b>                     | Kelle Marsalis, IOM, CCE      |
| II.  | <b>Approval of Minutes</b>                           | Kelle Marsalis, IOM, CCE      |
| III. | <b>Nominating Committee Report</b>                   | Brad Lacy, IOM, CCE           |
| IV.  | <b>Analysis of 2017 West Institute</b>               | Board Members/Institute Staff |
|      | A. Final Enrollment Report                           |                               |
|      | B. Survey Results and Discussion of Institute Week   |                               |
| V.   | <b>2018 West Institute</b>                           | Brad Lacy, IOM, CCE           |
|      | A. Create 2-3 Strategic Goals                        |                               |
|      | B. Discussion of Week/Assign Regent Responsibilities |                               |
| VI.  | <b>Institute Staff Update</b>                        | Institute Staff               |
|      | A. Program Updates                                   |                               |
| VII. | <b>Other Business/Adjournment</b>                    | Kelle Marsalis, IOM, CCE      |

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



## MINUTES JULY 9, 2017 11:00 AM PDT

### BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

**In attendance:** Kelle Marsalis, IOM, CCE; Brad Lacy, IOM, CCE; Tony Vedda, IOM, CCE; Alysia Bell, IOM; Jason E. Camis, IOM; Ryan Evans, IOM; Tony Felker, IOM, CCE; Lisa Hermes, IOM; Jim Johnson, IOM; Russell Lahodny, IOM; Jennifer Reiser, IOM; Katie Stice, IOM, ACE; Gene Terry, IOM, CAE; Laura Grimes, IOM; Kiyundra Gulley, IOM; Thane Phelan, IOM; Darletta D. Willis, IOM; Karyn K. MacRae, IOM, CAE, CMP; Shelby A. Parish, IOM, CAE, CMP; Andrew Weller, IOM

#### I. Welcome and Introductions

Kelle Marsalis, 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, 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 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.
- 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 West Regent Scholarship Fund.
- Additional business
  - Any remaining business was discussed prior to adjourning the meeting.

#### III. Class Advisor Welcome and Introductions

Brad Lacy, IOM, CCE welcomed the Class Advisors to the meeting and introductions were made.

## MINUTES JULY 9, 2017 11:00 AM PDT

### 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.\*\****



## 2018 SCHEDULE OF ACTIVITIES

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

### Sunday, July 8

11:00 a.m.–11:30 a.m. **Board of Regents Meeting:** University Hall, 3999  
11:30 a.m.–12:15 p.m. **Board & Class Advisor Briefing:** University Hall, 3999  
12:15 p.m.–12:45 p.m. **Board & Class Advisor Lunch:** University Hall, 3999  
12:45 p.m.–1:00 p.m. **Board & Class Advisor Additional Business:** University Hall, 3999  
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 (4<sup>th</sup> 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 9

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  
4:15 p.m.–6:15 p.m. **Elective Classes:** University Hall, Individual Classrooms  
Evening **Class Dinner Option**

### Tuesday, July 10

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  
10:30 a.m.–11:00 a.m. **Board of Regents Meeting:** Faculty/Regent Office, University Hall  
12:30 p.m.–1:00 p.m. **Box Lunch:** University Hall, East Atrium  
1:00 p.m.–4:30 p.m. **Core Classes:** University Hall, Individual Classrooms (*Break: 2:30–3:00 p.m.*)  
1:30 p.m.–2:00 p.m. **Class Advisor Meeting:** Faculty/Regent Office, University Hall  
Evening **Class Dinner Option**

### Wednesday, 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  
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.*)  
6:30 p.m.–10:30 p.m. **Graduation Ceremony and Big Bash:** TBD

### Thursday, July 12

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, University Hall  
11:30 a.m. **2018 West Institute Concludes**



# WEST

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

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## 2018 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

### Class Advisors

Tony Felker

### Silent Auction/Fundraising

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

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

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

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

### Industry Consultations

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

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

### Scholarships

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

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

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

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

### Institute Kickoff

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

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

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

### Big Bash

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

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

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

### Volunteer/Faculty/Staff Dinner

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

### State Photos

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

### Lunch Roundtable Discussions

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

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

### Social Media Strategy (Optional)

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

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



# WEST

## GEOGRAPHIC BREAKDOWN

### 2017 West Institute

### 114 Attendees from 27 states and the District of Columbia

#### State, Number of Attendees, %

Alaska, 1,	0.88%	Nebraska, 1,	0.88%
Arkansas, 9,	7.89%	Nevada, 1,	0.88%
Arizona, 1,	0.88%	New Mexico, 1,	0.88%
California, 18,	15.79%	New York, 1,	0.88%
Colorado, 5,	4.39%	Oklahoma, 1,	0.88%
District of Columbia, 16,	14.04%	Oregon, 4,	3.51%
Georgia, 1,	0.88%	South Dakota, 1,	0.88%
Illinois, 2,	1.75%	Tennessee, 1,	0.88%
Iowa, 5,	4.39%	Texas, 28,	24.56%
Kansas, 3,	2.63%	Virginia, 2,	1.75%
Kentucky, 1,	0.88%	Washington, 1,	0.88%
Missouri, 2,	1.75%	Wisconsin, 2,	1.75%
Montana, 1,	0.88%	Wyoming, 2,	1.75%
North Carolina, 2,	1.75%		

#### Top Increases Since 2016:

District of Columbia	+12
Texas	+4
Iowa	+3

Most Attendees in 2016, Texas with 26

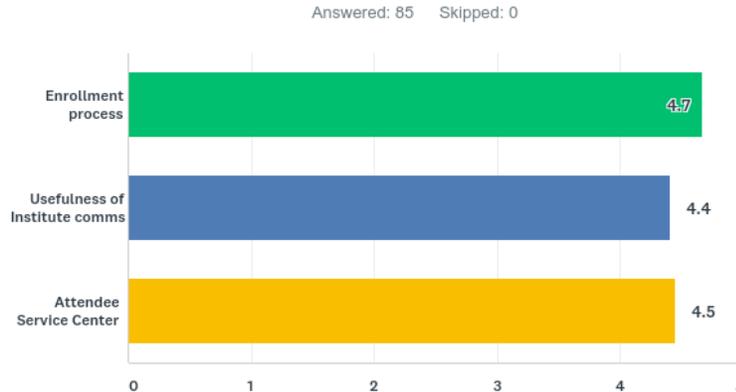
Most Attendees in 2017, Texas with 28

2107 West 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\*:

- More consolidated emails and from one point of contact would be easier to manage. At times I was getting so many emails from different individuals it was difficult to keep up.
- Communication was excellent throughout the whole process.
- Great communications from our class advisor.
- There were too many communications from multiple people and for first year, it wasn't clear who was who. Prefer all communications from class advisor.
- I think the service center should have been mentioned earlier in the process. Leading into the week, I was receiving many emails with various pieces of information when the service center would have been better utilized.
- I was pleased with the communications from Institute, but our class communication prior to Institute was minimal.
- Far too many emails from IOM-related people (especially from class adviser, people coordinating tshirts, class dinner) in the weeks beforehand.
- For those that want to register early but waiting to see if there's a scholarship, I'd suggest adding instructions on how to "be invoiced" for the registration.
- The Service Center was somewhat confusing. Links on pages were not obvious. Having to go through the entire registration process to change electives was cumbersome and annoying.
- After registering the invoice/receipt I received listed only the Core Classes I was taking. It would have been helpful to also list my Elective Classes. I had a difficult time and don't think I was able to go back and review the Elective Classes I had selected when I registered.
- Very well organized.
- Staff were very helpful.

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

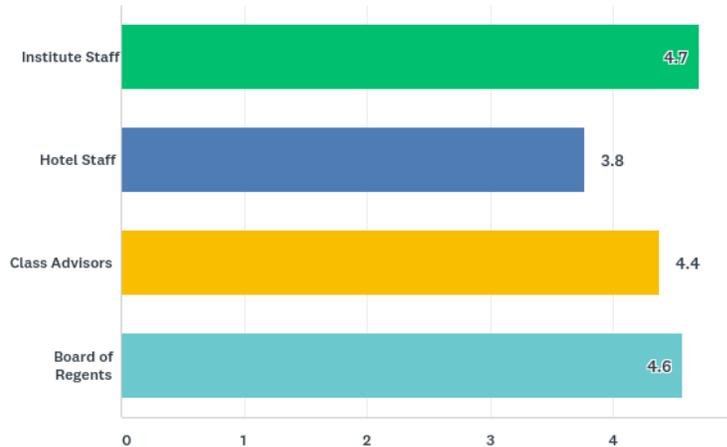


## ATTENDEE SURVEY RESULTS AND FEEDBACK

- Communication leading up to Institute can sometimes be too much, especially for those that are returning to the site. Fewer e-mails that contain only the most necessary information could be supplemented by a link to a FAQs section on the website for those that want more detail.
- Required a more direct list of things that need to be done prior to arriving. Such as: clearly state that power point presentations will not be provided and they should be printed prior to arriving at the event. Same goes for handouts. This information may have been communicated but if they were, they were in hidden in lengthy emails or likely missed due to the amount of messages being sent regarding t-shirt design and dinner.
- Information from Institute was appreciated, though we only heard from our advisor once.
- Communications from Institute staff were clear. There was a complete lack of communication from class advisor.
- There was a lot of communication prior to the institute week. It was a bit of information overload. I would suggest streamlining the emails and maybe having more details in a separate forum like the fb group.

### Q5 Customer Service

Answered: 85 Skipped: 0



### Additional comments about customer service\*:

- Very impressed with the excellent customer service that was provided in all areas.
- Institute Staff was very fun and helped make the week more enjoyable.
- Hotel was horrible!
- I think the great customer service comes from how much those involved with Institute care for the program and its participants success.

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



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## ATTENDEE SURVEY RESULTS AND FEEDBACK

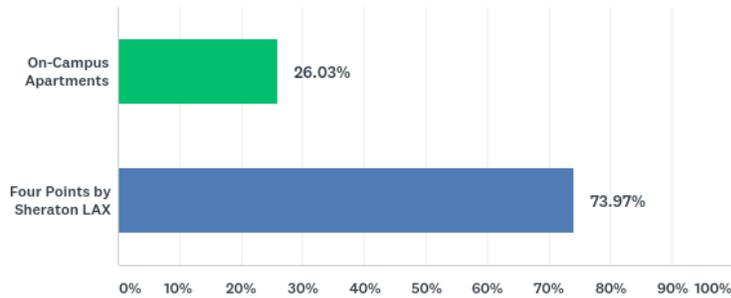
- The hotel keys never worked and the elevator kept breaking down.
- Hotel staff and service was pretty poor this year. Our class advisor was good on communication prior to our week in L.A., but she was somewhat disengaged the week of.
- Our class advisor was very helpful. She collected money for our class dinner via email and placed the order in advance to reduce the wait time.
- I had to prepay for the hotel with a company card that would not be on me at the time I checked in. The process took a few hours and a few calls with the hotel to get situated. When you call the hotel, you get a call service unless you ask for the front desk. Seemed more difficult than it needed to be but all worked out.
- Low-energy advisor. Very nice, just low-energy.
- Our class adviser did not take too much of an interest in most of us in the cohort.
- Every person was very kind, accommodating and helpful.
- Very friendly and helpful.
- I always felt taken care of, as far as the program goes. However, I heard some comments from an advisor and a regent that were inappropriate in my opinion. My husband came with me and attended some events, so it was unfortunate that he had to hear comments such as "what happens at institute, stays at institute." It was a little awkward, even if said in a joking manner.
- The hotel staff was TERRIBLE. My credit card authorization form was missing at check-in, causing some serious issues with payment.
- I never interacted with Institute staff. As far as hotel staff, the first person said we couldn't check-in early because there weren't any rooms available, but then we went to another staff member and we were able to get rooms.
- Class advisor seemed to want to be part of the class instead of providing advice or guidance.
- It would be helpful for first time attendees to get an explanation of the difference between Institute Staff and Board of Regents. It's confusing.
- Stayed at the dorm. LMU online payment system does not work, staff are not customer friendly. Had to go to their office three times to resolve payment issues.
- Hotel was horrible.
- I had a number of issues with my room key needing to be re-keyed at least twice a day. It's not pleasant when you're in a bit of a rush and have to wait in line to get your room key re-keyed every time you come back to the hotel.

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

## ATTENDEE SURVEY RESULTS AND FEEDBACK

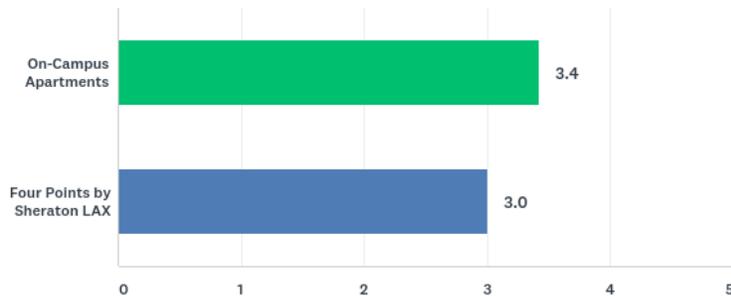
### Q7 Which hotel did you choose to stay at?

Answered: 73 Skipped: 12



### Q8 How would you rate your accommodations?

Answered: 82 Skipped: 3



### Additional comments about accommodations\*:

- My apartment was dirty, moldy, and smelled, and I couldn't get any response from LMU's Event Manager Kathryn Turner. Extremely poor customer service. I will not stay on-campus again.
- Very outdated but clean.
- Too far from places to grab dinner.
- The hotel wasn't great.
- Would have preferred a location where it was more pedestrian friendly with additional food outlets
- Several issues with hotel. Service was really poor this year. Slow, inattentive staff, car horn going off continuously in parking lot below my room, loud elevator bells, etc.
- The rooms were nice. I enjoyed the rooms better than the Custom Hotel, but I liked the location of the Custom.

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



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## ATTENDEE SURVEY RESULTS AND FEEDBACK

- Dorms were spacious but had two significant problems. First was the heat--when normal LA weather (breezy and 70s/80s), they're fine, but when we arrived it was a heat wave with temps in high 80s/low 90s. Nevertheless there was no way to turn on AC. Very hard to sleep. Secondly, our dorm was infested with ants. On Sunday I called campus facilities to come clean up ants in the kitchen, which they did. However, by that night there were ants in the bathroom, crawling out of the sink. Ants continued to swarm the bathroom. There were also many ants in the dorm rooms on furniture as well as in my bed.
- Liked that the hotel offered a free shuttle from the airport. Staff was very friendly, but room needed some updates.
- Not in a good location. Can't safely walk to anything.
- The food service was not good. Ran out of meat for one lunch and took 30 minutes to restock, more worried about presentation. Breakfast was not good. Last day did have eggs, bacon and other options.
- I appreciated the communication about what to bring as well as the snacks.
- The hotel staff was not in the loop about the bus transportation that was scheduled for us, which was confusing for a first-year.
- My room was very dilapidated unfortunately, and the service downstairs at the restaurant/lounge was awful.
- No air and it was really hot. Bed hard.
- Will stay in hotel next year even though it is more expensive.
- My room at the Four Points was not great. The paint was bubbling off the wall, the wallpaper seams were all split, the finish on the picture frame was peeling off, the drywall in the bathroom was poorly patched, broken tile, filthy carpet. The bed was miserable and overall, the room even with the ac running was really noisy.
- The hotel experience at the Four Points and The Custom has not been a positive aspect of the program. I assume that the affordable options in the area are limited, but I think it's worth exploring others if they're available.
- Very eh hotel but much better than the Custom. If I were coming back I would stay at the Embassy Suites across the street and walk to the bus stop.
- I had to call the front desk three times, because of pot smoking in an adjacent room. First two calls netted no results.
- The staff at the hotel were incredible. The rooms were disappointing at best. I would not choose to stay here again, which is unfortunate because our customer service really was impressive.
- The front desk staff was professional and helpful. The bellman was not helpful and appeared to be upset when we asked him for a restaurant suggestion. He gave us a Greek restaurant; when we responded that we were looking for something else he became curt and told us to go to the fast food restaurants. The restaurant at the hotel was limited in food selection and unable to handle the crowds on Sunday afternoon. Elevators are slow and frequently passed the floor requested.
- No AC, hot water ran out.

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

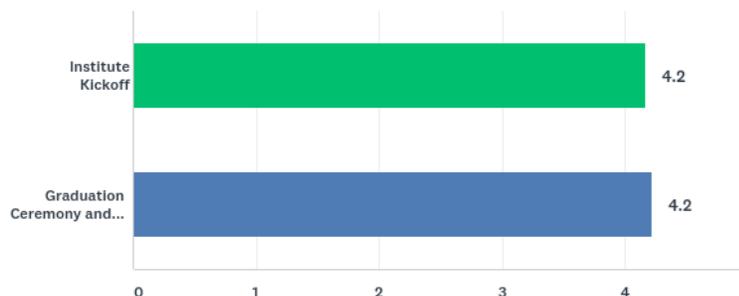


## ATTENDEE SURVEY RESULTS AND FEEDBACK

- Very hot and not a good value for the money. Location was great and it was a good way to meet people.
- One of the attendees woke up with bed bugs on the last day. I would not recommend this hotel next year.
- Upon checking out of the hotel our class was made aware of the presence of bed bugs in a classmate's room. This is the second hotel we've stayed at that's had issues with bug infestation. Shame on Institute staff for choosing the cheaper options at the expense of attendees health!
- I wasn't too impressed with the rooms for the price we were paying but I liked being close to the airport.
- The dorms are awesome but those beds are rough.
- Hotel was old and gross. Staff was not helpful. Car alarm went off for most of my entire stay (very often at 2 or 3 am and would last for hours) in the parking lot outside my room. Staff did not care.
- I selected an alternate hotel because it had a better rate than the Sheraton. It was very well done.
- Would rather stay closer to campus again, with the option to always walk to class.
- The elevators were a nightmare and the bar was severely understaffed, although the pool bar and concierge staff were very pleasant.
- Accommodation was great but the fact that the beds are four feet off the ground presented problems for some of my older colleagues. No ladder is provided to enter/exit the beds.
- Last year I stayed in the west tower and it was so much nicer than the east tower that I stayed in this year. The room was a lot smaller and not as clean.
- Horrible hotel and someone left with bed bugs.
- Room was old and literally falling apart.
- The side of the hotel I was on was pretty worn down. My "automatic" bathroom light never shut off and the tub never drained. Not a biggie - just thought you should know.
- It's just not a convenient location to campus. I really enjoyed walking to campus and can't do that from the Four Points. This year really made me miss the Custom.

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

Answered: 85 Skipped: 0



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



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## ATTENDEE SURVEY RESULTS AND FEEDBACK

### Additional comments about events\*:

- It was great as a first year to get to co mingle with other year students.
- The Kickoff was a whole lot of fun and the Big Bash was perfect.
- Great fun and well organized. The Big Bash was beautiful, food was not great, but the overall event was wonderful. The Kickoff was in scenic location and lots of fun.
- Bring back the BOAT!!! Thanks!
- Really fun events! Graduation was really awesome at the yacht club!
- I miss the boat.
- Food was pretty bad at kickoff. Also, kind of missed the class competition.
- Loved the new venue for graduation and party!
- I enjoyed the game we played at Institute kickoff! It was a great way to get everyone involved, and I plan to incorporate it in other settings. I also liked having the graduation ceremony and big bash at the same venue and on land. It allowed people to leave when they were ready. The food was also better than what we had last year, mostly due to the delicious hors d'oeuvres.
- The vegetarian option at the Big Bash was horrible. Not edible.
- I liked the new location of the Big Bash, it was just windy taking photos with longer hair.
- I enjoyed the new format versus the old one whereby each class would compete against each other.
- The kickoff event was a bit trickier as we didn't know each other (first years) but by the night of graduation/the big bash, we'd all gotten to know each other and even introvert-me had a good time!
- Graduation was very nice at the Yacht Club. However, the Big Bash was not as fun as in previous years. I also somewhat disliked the dinner entree. I prefer to be back on the boat next year.
- But, I like the yacht experience better.
- I thought the shared location for the graduation and big bash was great. I'm guessing that it was more challenging logistically to do the graduation off-campus, but I thought the experience was very good and the extra effort was well worth it. Also, not being confined to the boat for a certain period of time is a plus.
- A little chilly outside for some.
- Didn't really care for assigned seating at dinner. Although, I could have moved seats I didn't want to be rude to my tablemates.
- Kind of chilly, perhaps warn folks to bring a sweater.
- The new venue for the Big Bash was great. Just a glitch with the vegetarian meal. My table was finished eating and I went and requested it. I will say that it was worth the wait! It was delicious.
- Liked the yacht club event better than the cruise event.
- Food at Big Bash was not good. Would it be an option to do something more simple, like a Taco Bar? Or something like that?
- Arrived late and there was no way to find the kickoff mixer. No signage or directions.
- At the kickoff, I thought it was great that everyone was able to participate in the game portion.

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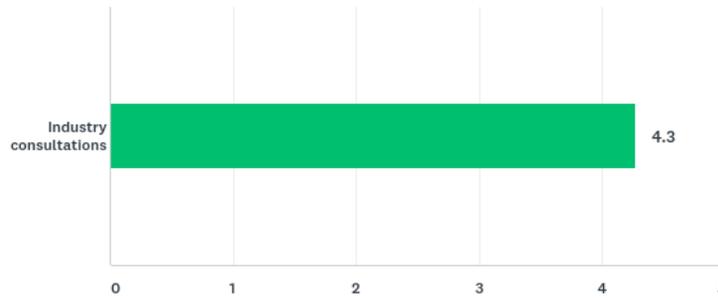
## ATTENDEE SURVEY RESULTS AND FEEDBACK

- I really like having graduation and the big bash all in one place.
- Ceremony should have been hold inside
- Great icebreaker game at the Kickoff, I plan to use that! The Big Bash was great, I really enjoyed it being outside, though the food was still really bad.
- Long walk to Institute Kickoff - the networking was fun. I have arthritis and the long walk was well long and uphill. The Big Bash was in a lovely location, but very long.
- I thought the food could have been better at both events.
- The Yacht Club was cool but I hope we're on the boat next year!
- Quality of food at both events was terrible. Yacht club was nice but food came out late and I assumed the bus would be delayed slightly but left on time leaving me to stay or pay to leave.
- Institute kick off activity was fun, good networking, beautiful view, lackluster food.
- Big bash only lost points for dinner. Appetizers and salad were great. Dinner was cold and not good.
- I loved graduation by the water and I also loved not being confined in the boat.
- Loved the marina.
- Loved the game at the kickoff but there was a disconnect with the volunteers the rest of the week.
- The events were great. I like the shift for the graduation location. However, trying to take photos outside in the wind was not easy. Also, it got chilly at night. Maybe consider an inside/outside option.
- Lots of fun, very engaging.
- The food at the yacht club was horrible and to pay \$75 for my guests meal was way overpriced for what we got. Many of my classmates ordered food/room service when the returned to the hotel.
- I loved the new Kickoff game. Thought it was a great way to get to know people. It also didn't take too long. Big Bash was much better. I wanted to stay on the yacht but the yacht club was a better option.
- The events and locations were ideal, the food was less than ideal.

## ATTENDEE SURVEY RESULTS AND FEEDBACK

Q12 Please rate your experience participating in industry consultations.

Answered: 84 Skipped: 1

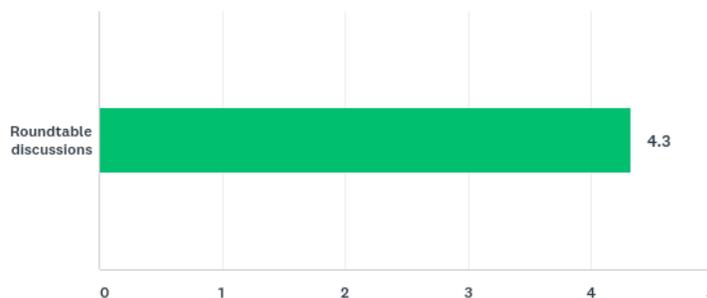


### Additional comments about industry consultations\*:

- Not enough time to really take advantage of them.
- I appreciated talking to others in the industry from across the country.
- Could've been paired with a more experienced/seasoned chamber.
- I must have missed this session.
- Really appreciate the consultations.

Q14 Please rate your experience participating in lunch roundtable discussions.

Answered: 85 Skipped: 0



### Additional comments about roundtable discussions\*:

- Received great tips on Accreditation process.
- Great way to connect with the other chambers. Able to talk more freely than in the class setting.
- Learned a lot from US Chamber about accreditation.

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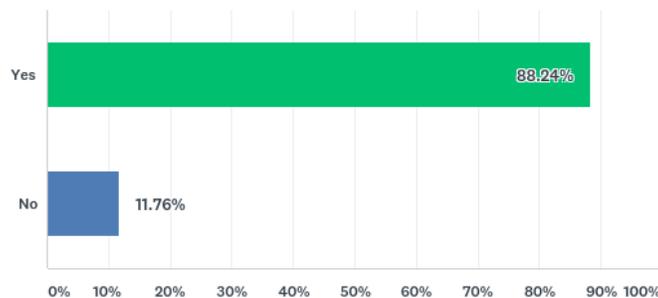


## ATTENDEE SURVEY RESULTS AND FEEDBACK

- I didn't participate in the lunch ones, but I did get lots of feedback from my class. I would like to see more roundtable events next year. I learn so much from participating in them. Lunch would be another good way to do it. Topics I would enjoy are more related to my job like marketing, fundraising, etc.
- Thought this was a great idea!
- Good discussions and would have liked to have had more time to discuss and learn from peers.
- Needs to be more guided, less free-form.
- Additional topics/facilitators would be nice.
- Wish more people participated.
- I did not participate since they are the same topics as prior years.
- You should do more of the lunch round tables. I really learn a lot and enjoy the gabbing and thoughtful conversation. I like that there is one person who understands the issue and can manage the conversation or correct the record.
- The weather was too nice to sit inside for lunch and after sitting in class most of the morning it feels good to get up and walk around.
- Thank you for organizing.

### Q16 Did you download the 2017 West Institute App?

Answered: 85 Skipped: 0

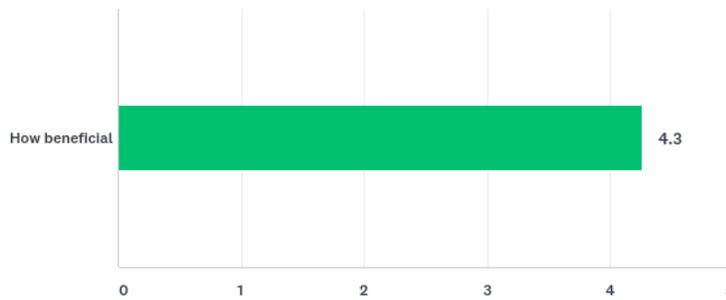


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## ATTENDEE SURVEY RESULTS AND FEEDBACK

## Q17 If you downloaded the app, how beneficial was the app to you?

Answered: 82 Skipped: 3



## Additional comments about the app\*:

- It was very useful for agenda as well as viewing all class downloads.
- Great tool and easy to use.
- Very helpful but couldn't use it if on a PC to download handouts. Had to email them to myself
- The attached materials did not regularly send to my email, or they were delayed. Following along with the documents was helpful during the classes. The other features were great - once I knew where to look for them.
- It was a great tool but there was little incentive to use it; I mostly relied on the paper copy of the bus schedule and course schedule and didn't realize there was an area to upload photos until after Institute or update my profile. (This was my fault, though; I should have explored it more.) It would helpful if there was a way to access the bidding app for the silent auction through the Institute app.
- App was only useful because I did not have a computer with me in class.
- Loved the app and that I had my schedule on it.
- Only gave it a 4 because I couldn't get the bus schedule on my Samsung.
- The app did not update on Androids so after the initial download it was not helpful when updates were sent. Finding and downloading presentations was not clear.
- Nice to have push notifications on it that said what was coming up - what events were next and where they were.
- Very useful.
- It would be great to connect the silent auction items to the app somehow.
- I only used the voting on auction items.
- You should link the auction to the app.
- Good idea.
- It may have been my fault, I didn't have time to research it. The previous year I was able to take notes in a location specific to particular courses, on my laptop from the app.

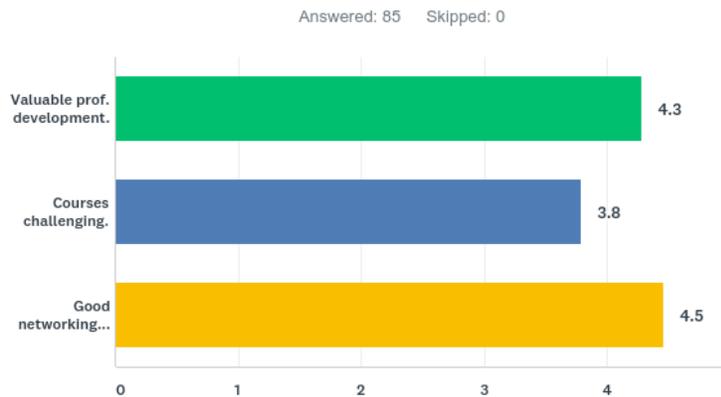
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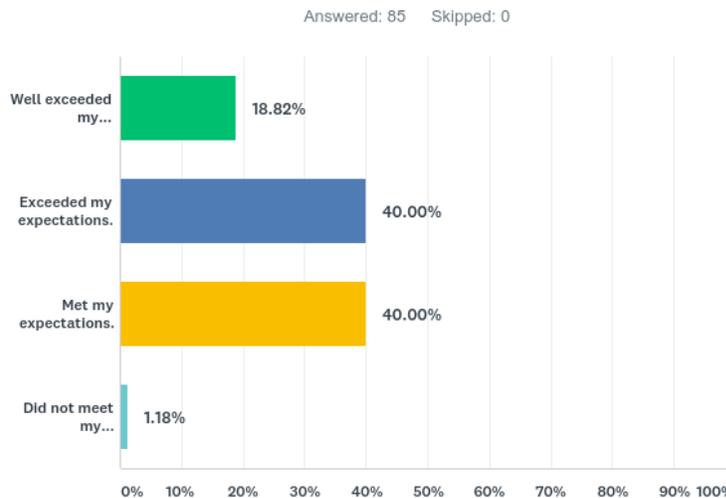
## ATTENDEE SURVEY RESULTS AND FEEDBACK

- Appreciated the press release template.
- Should be an easier way to see my schedule. I customized my classes but then it was several clicks to get to see it every time I opened the app.
- I printed my schedule of classes and times out and just followed the power points in class.
- Not really necessary.
- Love the app!
- This year's app was really useful and easy to use. Liked it very much.
- I thought the app was user friendly and nice to have the information readily available.

### Q19 Rate to what degree you agree with the following statements.



### Q20 Overall, to what extent did Institute meet your expectations?



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## ATTENDEE SURVEY RESULTS AND FEEDBACK

### Additional comments about Institute\*:

- I loved the experience of the program, great information and networking with other chambers and associations. Not only did I learn much about Chamber World I learned a little about myself along the way. Thank you for providing the educational experience as well as some fun and laughs.
- I learned a lot from the governance and finance classes, but was not expecting much of the week to be focused on soft skills (leadership, public speaking, etc.).
- Would like to see more diversity in trainers - race, home state, background, etc.
- Speakers need to be encouraged to engage their audience. The sessions are way to long for an instructor to simply lecture. Must be interactive.
- Chamber staff are great. All of the speakers were good, however, their content needs to be tailored to both associations and chambers.
- I was not impressed with food. Fish was not included within the menu even though I recommended it when first asked about my preferences.
- I wish there was assigned tables for the kick off and big bash-just to provide some forced networking so people didn't feel left out.
- My only comment is we utilize the same instructors too much. I had Dave Aker I think every year for something, great guy (and a good instructor) but you can only hear the same stories/anecdotes so many times before they lose impact.
- Love it! Love the classes, location and people. Thank you for working so hard to keep it relevant and amazing!
- Thumbs up on the selection of rooms. Furniture was far more comfortable than last year.
- Restroom maintenance schedules should not coincide with our breaks. Just say'n.
- Love the comfort level that the Board of Regents and class advisors instill into this experience. You set the tone. Great job!
- Year 2 instructors and classes were awesome. I appreciate that.
- So much of session content was really geared at chambers and was hard to find useful for Association professionals. The ones that were able to be more generally nonprofit mgmt I found the most beneficial. Too many sessions tried to cover too much information and would have rather dug deeper.
- Please bring back the Tex-mex/taco bar and Rice Krispies treats! We had the latter the first night, but I missed those tasty things during the week. But I didn't go hungry nor was my sweet tooth left unsatisfied. Speaking of snacks, thanks for providing healthy, protein-rich options during the breakfast snacks with the Greek yogurt and during breaks with the hardboiled eggs, vegetables, and hummus.
- The Government/Public Policy session was a waste of time. I'd like to see more options for learning more about operations, legal and financials.
- I had a great 4 years at West. Thanks to everyone who had a part putting together this program. It is something I'll always remember and find valuable in my career. Love the IOM recognition and what it stands for.

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## ATTENDEE SURVEY RESULTS AND FEEDBACK

- Please provide something besides carb intensive snack and breakfast. Many of us do not eat muffins, croissants, etc. It would be nice if there were protein options provided (eggs, bacon, meat, cheese, cashews, almonds, etc.).
- The Ethics course instructor was not prepared nor was she an expert on the topic.
- While the faculty is great, some of them have been teaching at Institute West for many years and, sorry to say, are getting a little "old". I think you need to continue to find new and engaging faculty. Several of the faculty just talked and talked and talked the entire time without making much of an effort to engage the participants.
- I really loved it - and I went into it quite cynical about how it would be. I thought the school aspect of it would be overplayed and silly, but it was actually really fun and really nice to get to know people. Thank you for what you do!!
- Instructors were very knowledgeable, informative and material could be immediately implemented at my chamber. The only expectation that fell short was the bonding with classmates. I had heard from IOM grads how close you get with classmates I might have expected more. I am considering fast tracking.
- Classes with take-home handouts that you can immediately apply are most valuable.
- Encourage more interaction between classes (1st yr, 2nd yr, 3rd yr, 4th yr). My 1st year was at southeast which was 3 times as large. Southwest was a nice intimate group overall, but didn't have much interaction with the 3rd & 4th years in particular. Really liked the icebreaker at kickoff.
- There was a lot of time spent running around between the hotel and the dorms. I realize there was an option to stay in the dorms but there were many complaints about those accommodations. Just wish it could all be in the same place.
- I truly enjoyed my 3rd Year at West Institute. Community Development is my vocation, and Institute significantly prepares me to be a valued leader in the industry. I also appreciate ending early on Thursday. However, I see the value for 1st years to have Tues afternoon (in the previous schedule) to connect with one another and the host city.
- The instructor that we had for our ethics class was disappointing at best. It's expensive for me to come to institute since I pay for everything myself and was excited for the ethics class, but the instructor was not prepared.
- This is an excellent program. Thank you to a local board regent from McKinney, TX for inviting me to this training. Can't wait for next year!
- It would be nice to develop networking opportunities for fast-trackers. It would be nice to have someone to share experiences with.
- Most classes were very good, a couple were disappointing. I liked last year's Big Bash better, but I know it is hard to please everyone.
- Really wish that instructors did not waste the first five minutes of class asking everyone to introduce themselves, where they're from and if they are with a chamber or association. I'm sure they get the class list in advance, it would be helpful if they reviewed it. Doing this repeatedly over the course of four days is tedious and a waste of time.

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## ATTENDEE SURVEY RESULTS AND FEEDBACK

- I would suggest that you try and identify additional instructors for IOM courses. I had several of the instructors multiple times, both during the week and previous years. At times, the same stories were told and adjusted for each class. Some of the information from the same instructors seemed to be the same regardless of the class which made for a very long week. Thank you for asking for our comments!
- More protein for breakfast please! Other than that, awesome!
- Maybe only a cold lunch one day? Would've liked a hot lunch another day. Enjoyed the new schedule and being able to leave early on Thursday.
- Looking forward to next year!
- Less storytelling and more theory would be helpful. Also, discussing solutions rather than problems.
- LA was definitely the friendliest site I've been to - compared to Tucson or Philly.
- I had a great time! Thank you!!
- Another terrific year, thanks to the West IOM team for all your hard work!!!
- It was a great experience. Need to find a way to keep people connected after they have graduated.
- Bus schedule on last day too rushed, 10 extra minutes to say good-bye to everyone would have been great.
- Better food! The food wasn't as good as the year before. I'm not a vegetarian but I heard from a couple of them and they would like more options.
- The discussion among the entire class while the instructor was present was wonderful. It was kind of a "this is what I need help with" thing and it was nice to get ideas from both the presenters and our peers.
- Overall, institute was an outstanding experience. I learned a great deal from my peers and from the instructors. The program is definitely geared toward chambers and I would encourage a little more emphasis or focus be redirected to the association area.
- I love Institute and I hope I can be a class advisor or on the board next year!
- Some of the clothing worn was inappropriate. No need to see belly buttons or bottoms.
- Institute was more than I expected; I can't wait to go back.
- This was my best year yet! The network of individuals in my class is priceless! I think our bonds were strengthened even more this year making the thought of graduation next year bittersweet!
- Had a wonderful and memorable experience. I will recommend others on my staff attend.
- I always gain valuable information from IOM and meet Chamber execs from all over the country to share ideas and best practices with. The classes this year kept my attention and were well instructed. The only thing I'm not a big fan of is the hotel and its location but that is a minor factor in an overall great experience.
- The classes and instructors were great, the food options were tough. There was one day when there was not enough lunch for everyone to be served. More and varied food options with healthy protein would be a nice addition for next year.

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