



Institute for Organization Management

Institute for Organization Management

Fall Board Meeting

October 4–5, 2018



U.S. CHAMBER OF COMMERCE FOUNDATION



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

As the nation's premier nonprofit professional development program, Institute equips association and chamber leaders with the innovative ideas to expand their organizations' influence and fosters individual growth through interactive learning and networking opportunities.



GENERAL INFORMATION

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

AGENDA

BOARD OF TRUSTEES, BOARDS OF REGENTS, AND CURRICULUM COMMITTEE MEETINGS
OCTOBER 4 – OCTOBER 5, 2018
U.S. CHAMBER OF COMMERCE
WASHINGTON, D.C.

THURSDAY, OCTOBER 4

- 8:30 a.m. – 9:00 a.m. **Continental Breakfast for the Curriculum Committee**
3M/RJR
Curriculum Committee Members Only
- 9:00 a.m. – 12:00 p.m. **Curriculum Committee Meeting**
3M/RJR
Curriculum Committee Members Only
- 12:00 p.m. – 12:30 p.m. **Joint Lunch**
Hall of Flags
Board of Trustees, Boards of Regents, Curriculum Committee
- 12:30 p.m. – 3:00 p.m. **Afternoon Joint Session**
Hall of Flags
Board of Trustees, Boards of Regents, Curriculum Committee
- 3:00 p.m. **Hill Visits**
Schedule On Your Own
- 6:00 p.m. – 8:00 p.m. **Board Dinner**
Cuba Libre
Board of Trustees, Boards of Regents, Curriculum Committee



GENERAL INFORMATION

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

FRIDAY, OCTOBER 5

- 8:00 a.m. – 8:30 a.m. **Continental Breakfast for the Board of Trustees**
Lee Anderson Veterans Center
Board of Trustees Members Only
- 8:30 a.m. – 10:00 a.m. **Board of Trustees Meeting**
Lee Anderson Veterans Center
Board of Trustees Members Only
- 10:15 a.m. – 12:00 p.m. **Boards of Regents Meetings**
Winter Board – Amway
Midwest Board – 3M
Southeast Board – Library
West Board – RJR Nabisco
Northeast Board – Emerson Electric
- 12:00 p.m. – 12:45 p.m. **Board Luncheon**
Ron Eidshaug, Vice President, Congressional and Public Affairs
U.S. Chamber of Commerce
Hall of Flags
Board of Trustees, Boards of Regents
- 12:45 p.m. – 2:15 p.m. **Education Session**
Pamela J. Green, MBA, SPHR, ACC
The HR Consulting and Career Institute
Hall of Flags
Board of Trustees, Boards of Regents
- 2:15 p.m. **Formal Meeting Agenda Concludes**



GENERAL INFORMATION

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

STAFF CONTACTS

Raymond P. Towle, IOM, CAE

Vice President, Federation Relations and
Institute for Organization Management
U.S. Chamber of Commerce
202-463-5853
rtowle@uschamber.com

Karyn K. MacRae, IOM, CAE, CMP

Director, Institute for Organization Management
U.S. Chamber of Commerce Foundation
202-463-5704
kmacrae@uschamber.com

Katelynne G. Cox

Associate Manager, Institute for Organization
Management
U.S. Chamber of Commerce Foundation
202-463-3136
kgcox@uschamber.com

Caitlin C. Gayles

Associate Manager, Institute for Organization
Management
U.S. Chamber of Commerce Foundation
202-463-5524
cgayles@uschamber.com

Andrew Y. Weller, IOM

Associate Manager, Marketing and
Communications
Institute for Organization Management
U.S. Chamber of Commerce Foundation
202-463-5802
aweller@uschamber.com

Megan Kastner

Program Coordinator, Institute for
Organization Management
U.S. Chamber of Commerce Foundation
202-463-5785
mkastner@uschamber.com



BOARD OF TRUSTEES

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

2018 ROSTER

CHAIR

Chris E. Wallace, IOM, CCE
President and CEO
North Texas Commission
8445 Freeport Parkway, Suite 640
Irving, TX 75063
469-359-5336
chris@ntc-dfw.org
Term: 2017-2018

VICE CHAIR

Jeremy L. Arthur, IOM
President and CEO
Chamber of Commerce Association of Alabama
2 North Jackson Street, Suite 603
Montgomery, AL 36104
334-240-8758
jarthur@bcatoday.org
Term: 2017-2018

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

Bryan Daniels, IOM, CCE, CEcD
President and CEO
Blount Partnership
201 South Washington Street
Maryville, TN 37804
865-983-2241
bdaniels@blountpartnership.com
Term: Through 2018

CHAIR ELECT

Megan A. Lucas, IOM, CCE, CEcD
Chief Executive Officer and Chief Economic
Development Officer
Lynchburg Regional Business Alliance
300 Lucado Place
Lynchburg, VA 24504
434-845-5966
MeganLucas@lynchburgregion.org
Term: 2017-2018

PAST CHAIR

Joseph B. Henning, IOM, CAE, ACE
President and CEO
Aurora Regional Chamber of Commerce
43 West Galena Boulevard
Aurora, IL 60506
630-256-3181
jhenning@aurora-chamber.com
Term: 2017-2018

Rich Cantillon, IOM
President and CEO
Ponca City Area Chamber of Commerce
PO Box 1109
Ponca City, OK 74602
580-765-4400
rich@poncacitychamber.com
Term: 2017-2018

Catherine S. Dority, IOM
Director of Marketing
Charleston Area Convention and Visitors Bureau
423 King Street
Charleston, SC 29403
843-805-3090
cdority@explorecharleston.com
Term: 2011-2018



BOARD OF TRUSTEES

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

2018 ROSTER

David Johnson, IOM, CAE

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

Dawn Johnson, IOM

Vice President
Muskegon Lakeshore Chamber of Commerce
380 West Western Avenue, Suite 202
Muskegon, MI 49440
231-722-3751
johnsond@muskegon.org
Term: 2012-2018

Brad Lacy, IOM, CCE

President and CEO
Conway Area Chamber
900 Oak Street
Conway, AR 72032
501-329-7788
brad@conwayarkansas.org
Term: Through 2018

Jack Lank, IOM

President and CEO
The United Regional Chamber of Commerce
310 South Street
Plainville, MA 02762
508-316-0861
jack@unitedregionalchamber.org
Term: 2017-2018

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: Through 2017

Matt R. McCormick, IOM, CCE

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

Timothy M. McKee, IOM

Chief Executive Officer
Olathe Chamber of Commerce
18001 West 106th Street, Suite 160
Olathe, KS 66061
913-764-1050
tmckee@olathe.org
Term: 2012-2018

Crystal Moore, CAE

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



BOARD OF TRUSTEES

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

2018 ROSTER

Stephanie M. Parton, IOM, CAE

Vice President, Communications
Indiana CPA Society
900 East 96th Street, Suite 250
Indianapolis, IN 46240
317-726-5026
sparton@incpas.org
Term: Through 2018

Carrie Stuart, IOM

President
Gettysburg Adams Chamber of Commerce
1382 Biglerville Road
Gettysburg, PA 17325
717-334-8151
carries@gettysburg-chamber.org
Term: Through 2018

Raymond P. Towle, IOM, CAE

Vice President, Institute for Organization
Management
U.S. Chamber of Commerce
1615 H Street, NW
Washington, DC 20062
202-463-5853
rtowle@uschamber.com
Term: Standing

Marnie L. Uhl, IOM, ACE

President and CEO
Prescott Valley Chamber of Commerce
7120 Pav Way, Suite 102
Prescott Valley, AZ 86314
928-772-8857
marnie@pvchamber.org
Term: 2012-2018

Scott Waller, IOM

President and CEO
Mississippi Economic Council
PO Box 23276
Jackson, MS 39225
601-969-0022
swaller@mec.ms
Term: 2015-2018

BOARD OF TRUSTEES AGENDA



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

FALL 2018 MEETING

OCTOBER 5, 2018
8:30 A.M.–10:00 A.M. EDT
U.S. CHAMBER OF COMMERCE
WASHINGTON, D.C.

I. Welcome and Introductions

Chris E. Wallace, IOM, CCE
Chair, Institute for Organization Management
President and CEO, North Texas Commission

II. Approval of Minutes

February 6, 2018

III. Approval of Nominating Committee Reports

IV. Consent Agenda

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

V. Curriculum Committee Report

VI. Updates

- a. Opening Kickoff Session
- b. West Institute and ACCE
- c. 2019 Winter Institute
- d. Diversity Taskforce Update

VII. Chairman's Report

VIII. Looking Ahead

Megan A. Lucas, IOM, CCE, CEcD
Chair Elect, Institute for Organization Management National Board of Trustees
CEO and Chief Economic Development Officer, Lynchburg Regional Business Alliance

IX. Other Business

X. Adjournment

Next Meeting via Conference Call: February 5, 2019 from 11:30 a.m. to 1:00 p.m. EST
Next In-Person Meeting: October 4, 2019, Washington, DC

BOARD OF TRUSTEES AGENDA



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

2018 WINTER MEETING

MINUTES FEBRUARY 6, 2018 11:30 A.M.–1:00 P.M. EST CONFERENCE CALL

In attendance: Chris E. Wallace, IOM, CCE; Megan A. Lucas, IOM, CCE, CEcD; Jeremy L. Arthur, IOM; Joseph B. Henning, IOM, CAE, ACE; Christin W. Berry, CAE; Rich Cantillon, IOM; Bryan Daniels, IOM, CCE, CEcD; Karen DeVecchio, IOM, CAE; Kimberly Guida, IOM, CAE; DJ Johnson, IOM, CAE; Dawn Johnson, IOM; Brad Lacy, IOM, CCE; Jack Lank, IOM; Kelle Marsalis, IOM, CCE; Timothy M. McKee, IOM; Stephanie M. Parton, IOM, CAE; Carrie Stuart, IOM; Raymond P. Towle, IOM, CAE; Karyn K. MacRae, IOM, CAE, CMP; Caitlin Gayles; Andrew Weller, IOM; Alyssa Kobernick

Not in attendance: Catherine S. Dority, IOM; Matt R. McCormick, IOM, CCE; Crystal Moore, CAE; Marnie L. Uhl, IOM, ACE; Scott Waller, IOM; Shelby A. Parish, IOM, CAE, CMP

I. Welcome and Introductions

Chris E. Wallace, IOM, CCE welcomed everyone to the call and introductions were made. Congratulations was given to the Winter Board of Regents on a job well done.

II. Approval of Minutes

The minutes from the October 6, 2017 meeting were unanimously approved.

III. Approval of Nominating Committee Report

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

BOARD OF TRUSTEES

NEW TRUSTEE

Nick Kieffer, IOM, CP
President and CEO
Goshen Chamber of Commerce
Goshen, IN
Term: Through 2019 *as Chair of Winter Board of Regents*

ROTATING OFF

Stephanie M. Parton, IOM, CAE
Vice President, Communications
Indiana CPA Society
Indianapolis, IN
Term: Through 2018 *as Chair of Winter Board of Regents*

CURRICULUM COMMITTEE

NEW MEMBER

Robert Medler, IOM
Vice President, Government Affairs
Tucson Metro Chamber
Tucson, AZ
Term: Through 2019 *as Vice Chair of Winter Board of Regents*

ROTATING OFF COMMITTEE

Nick Kieffer, IOM, CP
President and CEO
Goshen Chamber of Commerce
Goshen, IN
Term: Through 2018 *as Vice Chair of Winter Board of Regents*

BOARD OF TRUSTEES AGENDA



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

2018 WINTER MEETING

WINTER BOARD OF REGENTS

Chair

Nick Kieffer, IOM, CP
President and CEO
Goshen Chamber of Commerce
Goshen, IN
Term: 2018-2019

Vice Chair

Robert Medler, IOM
Vice President, Government Affairs
Tucson Metro Chamber
Tucson, AZ
Term: 2018-2019

Past Chair

Stephanie M. Parton, IOM, CAE
Vice President, Communications
Indiana CPA Society
Indianapolis, IN
Term: 2018-2019

The following individuals are nominated:

Josh Driskell, IOM
President and CEO
Jenks Chamber of Commerce
Jenks, OK
Term: 2018-2020

Michael W. Johnson, IOM
President and CEO
National Stone, Sand, & Gravel Association
Alexandria, VA
Term: 2018-2020

Erica Pangburn, IOM
Director of Community Engagement
Abilene Chamber of Commerce
Abilene, TX
Term: 2018-2020

Term Renewals (two-year term):

Kara Beer, IOM
President
Battle Creek Area Chamber of Commerce
Battle Creek, MI
Term: 2016-2020

Karri Clark, IOM
Director of Sales and Membership Operations
Bozeman Area Chamber of Commerce
Bozeman, MT
Term: 2016-2020

Mike Hofman, IOM
Executive Director
Orange City Chamber of Commerce
Orange City, IA
Term: 2016-2020

Rick Howe, IOM
Vice President
Jackson Hole Chamber of Commerce
Jackson, WY
Term: 2014-2020

William Lee, IOM
Chief Executive Officer
Gallup-McKinley County Chamber of Commerce
Gallup, NM
Term: 2014-2020

Douglas MacKay, IOM, N.D.
Senior Vice President, Scientific and Regulatory
Affairs
Council for Responsible Nutrition
Washington, DC
Term: 2016-2020

REMAINING ON BOARD, NO ACTION REQUIRED

Steven Baas, IOM
Vice President for Government Affairs
Metropolitan Milwaukee Association of Commerce
Milwaukee, WI
Term: 2015-2019

BOARD OF TRUSTEES AGENDA



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

2018 WINTER MEETING

Erin Carney, IOM
President
Metrocrest Chamber of Commerce
Carrollton, TX
Term: 2017-2019

Rudy P. Flores, IOM
Executive Director
Lincoln Square Ravenswood Chamber of Commerce
Chicago, IL
Term: 2017-2019

Steve Halter, IOM, EDFP, PCED
President
Greater Poplar Bluff Area Chamber of Commerce
Poplar Bluff, MO
Term: 2015-2019

Brenda Gudex, IOM
Director of Agricultural Programs and Leadership
Fond du Lac
Envision Greater Fond du Lac, Inc.
Fond du Lac, WI
Term: 2017-2019

Lynn Olberding, IOM
Executive Director
Marshalltown Area Chamber of Commerce
Marshalltown, IA
Term: 2017-2019

ROTATING OFF BOARD

Blain Andera, IOM
Executive Director
Spirit Lake Chamber of Commerce
Spirit Lake, IA
Term: 2012-2018

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

IV. Program Updates

Staff provided overviews of various aspects of the program.

- a. Marketing (Andrew Weller, IOM)
 - In the Winter Institute offseason, ads were placed in a number of publications, such as ACCE's *Chamber Executive* magazine. These were supplemented with online ads and other hardcopy marketing materials.
 - Usage of the Snapchat Geofilter at the Big Bash was in line with numbers that we saw from filters at 2017 summer sites. We plan on continuing this service as it has a minimal cost and attendees enjoy it.
 - New blue bag giveaways for attendees were well received on-site and will be a useful marketing piece throughout the year.
 - 2018-2019 planners have been released and will serve as this year's "walking advertisement." This piece is refreshed annually.

BOARD OF TRUSTEES AGENDA



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

2018 WINTER MEETING

- b. Social Media (Andrew Weller, IOM)
 - All Institute social media platforms experienced positive growth in the past year.
 - LinkedIn, Facebook, Instagram, Twitter
 - The number of tweets containing the hashtag #IOMeducates did dip down during the Winter week compared to last year, which may have been due to factors such as lower faculty engagement, MeetingPlay app usage, and increased Instagram usage.
 - Introducing new weekly social media campaign that highlights specific IOM classes and the on-site classroom experience.
 - Continuing weekly #TestimonialTuesday posts and reintroducing the monthly video testimonial series.

- c. Scholarships (Karyn K. MacRae, IOM, CAE, CMP)
 - 2017 was a great year for fundraising, which means that 2018 scholarships are in great shape.
 - As of today we will be able to allocate \$47,959 in tuition scholarships across the five sites.
 - We are seeing a positive trend in returning attendees making donations while registering for the program. \$385 was donated in 2016, \$570 was donated in 2017, and we are already at \$200 for 2018.
 - The National scholarship program will see some changes starting in summer 2018. In an effort to reduce program budget deficits, the U.S. Chamber of Commerce Foundation will reduce the number of National Scholarships awarded per site from ten to one. As of today, each site will continue to receive the \$1,000 gift from the Foundation.

- d. Fundraising (Karyn K. MacRae, IOM, CAE, CMP)
 - Institute was \$2,500 shy of reaching the 2017 fundraising goal.
 - However, the on-site fundraising goal was surpassed by almost \$6,000. Congratulations to all five sites for their incredible work in 2017.
 - The 2018 fundraising goal will once again be \$45,000 with the same goal of increasing donor participation amongst non-board member alumni.
 - Institute will no longer be sending out an annual letter campaign to alumni. The cost and time attributed to the mailing negated most, if not all of the benefits.
 - Staff is very optimistic about 2018 fundraising.

BOARD OF TRUSTEES AGENDA



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

2018 WINTER MEETING

- e. Winter geographic breakdown (Alyssa Kobernick)
 - The 2018 Winter Institute goal was 223 overall attendees, with 66 first-years. Final numbers were 248 overall attendees and 60 first-years.
 - The majority of attendees came from chambers, at 64.92%, in comparison to associations, at 24.60%.
 - The majority of attendees ranged in age from 31-40 years old, were female, and held the senior executive position.
 - The top increases since 2017 Winter were Texas with six more attendees and North Carolina with 5 more attendees.

- f. Curriculum, faculty and evaluations update (Caitlin Gayles)
 - Electronic course evaluations were tested at 2017 Northeast and fully implemented for the year starting with Winter. Overall, the feedback about electronic course evaluations has been positive and we are working to streamline that process even more.
 - An example of the course evaluation questions was provided in the meeting materials. It is shorter than previous course evaluations and can be finished within 5 minutes. The process allows us to compile faculty scores and feedback faster.
 - A list of courses that were audited at 2018 Winter was also available in the materials. The summer sites will have a similar list.
 - Finally, the new 501(c)(3) foundations class, which was approved during the Fall Board Meeting, will go live this summer. All other changes voted on in the fall were implemented at Winter.

V. Boards of Regents' Reports

Each of the five Board of Regents Chairs highlighted one success/best practice and one challenge/opportunity to share with the Board of Trustees.

- a. Winter Board of Regents report
Stephanie M. Parton, IOM, CAE reported on the success of Winter, highlighting that the volunteers pulled together to make the best of the week, in spite of facing many logistical challenges that were out of their control. The concern posed to the trustees was about how there seems to be a few Class Advisors each year who miss the mark, and unfortunately, regents and staff don't find out about it until after the week has ended.

- b. Midwest Board of Regents report
Dawn Johnson, IOM reported that the Midwest board is a strong group who is focused on providing a great attendee experience. The main challenge is fundraising, and regents have already been tasked with reaching out to their own classmates to assist in fundraising and recruitment efforts.

BOARD OF TRUSTEES AGENDA



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

2018 WINTER MEETING

- c. Southeast Board of Regents report
Bryan Daniels, IOM, CCE, CEcD shared that one of Southeast's strongest traits is the engagement and energy felt on-site from the participants. He reported that the biggest challenge continues to be the small number of associations at the site.
- d. West Board of Regents report
Brad Lacy, IOM, CCE reported that fundraising continues to be a strong point at the West site. With having raised over \$12,000 in 2017, the site has developed a culture and the ability to raise the most money despite having the smallest number of people. The main challenge is the size of the site, but opportunities for growth exist with W.A.C.E. Academy graduates, as well as mid-level management from metro chambers across the country.
- e. Northeast Board of Regents report
Carrie Stuart, IOM shared that the Northeast board continues to focus on enhancing the on-site experience with customer service. They are in the process of creating an ambassador program, where current attendees will serve as extensions of the board in helping first-time attendees navigate their way through the week. A challenge is diversity in recruitment, which they hope to combat through targeting diverse organizations at the state level.

VI. Discussion and Brainstorming

a. Recruitment Efforts

The floor was open for trustees to share their recruitment efforts thus far, as well as any ideas or strategies they have for the future. Highlights of the discussion can be found below.

- Current registration numbers are on track with previous years.
- The idea of targeting those who have not passed the CAE exam after results are released was discussed.
- The CAE/CCE congratulatory message sent to IOM alumni should include a fundraising ask.
- Personal testimonials, along with distributing program materials and wearing IOM ribbons at state conferences, are all powerful recruitment tools.

VII. Chairman's Report

Chris E. Wallace, IOM, CCE delivered his chairman's report, which included the points below.

- The work done by the Curriculum Committee was recognized and it was reiterated that curriculum changes made at the 2017 Fall Board Meeting were incorporated at the 2018 Winter site.
- Stephanie Parton and the rest of the Winter Board of Regents were congratulated.
- Chris shared his positive experience at Winter and expressed excitement for the remaining four sites.

BOARD OF TRUSTEES AGENDA



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

2018 WINTER MEETING

VIII. Other Business

Staff provided an update to the group regarding budget and program changes. It was reported that these changes came as a result of being tasked with the challenge of shortening the gap on budget deficiencies and reducing the amount of negative cash flow. The group learned that the program has not made money in over 10 years, however this is the first year that Institute has received pushback from the U.S. Chamber on the budget. Starting this summer, the following changes will be implemented:

- **Scholarships:** The number of National Scholarships offered per site will be reduced to one.
- **Institute Kickoff/Homeroom:** The Institute Kickoff (speaking portion and reception) will be discontinued and Homeroom will be extended.
- **U.S. Chamber/CIPE Employees:** The Foundation will change the pricing structure for internal employees who attend the program.
- **Tuition:** Tuition will increase **beginning in 2019**. The exact dollar figure has not yet been decided, but it's important to note that the last time tuition was raised was in 2007.

Staff shared their appreciation for trustees' understanding and support, and for their assistance in helping to implement the changes.

Megan A. Lucas, IOM, CCE, CEcD provided a status update on the diversity and inclusion statement, sharing that it was in draft form and that an implementation strategy will be presented at the Fall Board Meeting.

IX. Adjournment

Excitement for 2018 was expressed and everyone was encouraged to continue to promote the program.

There being no other business the meeting was adjourned.

Next In-Person Meeting: October 5, 2018 in Washington, D.C.



NOMINATIONS

2019 BOARD OF TRUSTEES

Chair

Megan A. Lucas, IOM, CCE, CEcD
Chief Executive Officer and Chief Economic Development Officer
Lynchburg Regional Chamber Alliance
Lynchburg, VA
Term: 2018-2019

Chair Elect

Jeremy L. Arthur, IOM
President and CEO
Chamber of Commerce Association of Alabama
Montgomery, AL
Term: 2018-2019

Vice Chair

Matt R. McCormick, IOM, CCE
President
Columbia Chamber of Commerce
Columbia, MO
Term: 2018-2019

Past Chair

Chris E. Wallace, IOM, CCE
President and CEO
North Texas Commission
Irving, TX
Term: 2018-2019

Board of Regents Chairs (one-year term):

Tony Felker, IOM, CCE
President and CEO
Frisco Chamber of Commerce
Frisco, TX
Term: Through 2019 *as Chair of West Board of Regents*

Nick Kieffer, IOM, CP
President and CEO
Goshen Chamber of Commerce
Goshen, IN
Term: Through Winter 2019 *as Chair of Winter Board of Regents (confirmed February 6, 2018)*



NOMINATIONS

2019 BOARD OF TRUSTEES

Christine Kennedy, IOM, CCE, CPC, ELI-MP
Chief Operating Officer and Executive Vice President
Lynchburg Regional Business Alliance
Lynchburg, VA
Term: Through 2019 *as Chair of Southeast Board of Regents*

Peter J. McNamara, IOM, CAE, J.D.
President
New Hampshire Automobile Dealers Association
Concord, NH
Term: Through 2019 *as Chair of Northeast Board of Regents*

Angela Whitcomb, IOM
President and CEO
Shakopee Chamber of Commerce
Shakopee, MN
Term: Through 2019 *as Chair of Midwest Board of Regents*

Curriculum Committee Chair:

Jeremy L. Arthur, IOM
President and CEO
Chamber of Commerce Association of Alabama
Montgomery, AL
Term: Through 2019 *as Chair of Curriculum Committee*

At-large position (one-year term):

Steve Clark, IOM, CFE, J.D.
President and CEO
Fayetteville Chamber of Commerce
Fayetteville, NC
Term: 2018-2019

Kimberly Dahlsten, IOM
Vice President of Operations
Catawba County Chamber of Commerce
Hickory, NC
Term: 2018-2019

Gene Terry, IOM, CAE
Executive Director, American Society of Hand Therapists
Association Headquarters, Inc.
Mt. Laurel, NJ
Term: 2018-2019



NOMINATIONS

2019 BOARD OF TRUSTEES

At-large position (two-year term):

Rich Cantillon, IOM
President and CEO
Ponca City Area Chamber of Commerce
Ponca City, OK
Term: 2017-2020*
**Includes one-year at-large term (2017-2018)*

Mark L. Field, IOM, CCE
Senior Vice President of Membership
Knoxville Chamber of Commerce
Knoxville, TN
Term: 2018-2020

Jack Lank, IOM
President
United Regional Chamber of Commerce
Attleboro, MA
Term: 2017-2020*
**Includes one-year at-large term (2017-2018)*

Stephanie M. Parton, IOM, CAE
Vice President, Communications
Indiana CPA Society
Indianapolis, IN
Term: 2017-2020*
**Includes one-year term as Chair of Winter Board of Regents (2017-2018)*

Jodie Perry, IOM, CCE, CCEO-AP
President
Richland Area Chamber of Commerce
Mansfield, OH
Term: 2018-2020

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

Scott Waller, IOM
Executive Vice President and COO
Mississippi Economic Council
Jackson, MS
Term: 2015-2020*
**Includes one-year at-large term (2015-2016)*



NOMINATIONS

2019 BOARD OF TRUSTEES

REMAINING ON BOARD, NO ACTION REQUIRED

Standing:

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

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

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

At-large (two-year term):

DJ Johnson, IOM, CAE
Vice President, Membership
American Society of Interior Designers
Washington, DC
Term: 2015-2019

Kelle Marsalis, IOM, CCE
Vice President, Strategic Initiatives
Dallas Regional Chamber
Dallas, TX
Term: 2016-2019*

**Includes one-year term as Chair of West Board of Regents (2016-2017)*

ROTATING OFF BOARD

Board of Regents Chairs (one-year term):

Bryan Daniels, IOM, CCE, CEcD
President and CEO
Blount Partnership
Maryville, TN
Term: Through 2018 *as Chair of Southeast Board of Regents*



NOMINATIONS

2019 BOARD OF TRUSTEES

Dawn Johnson, IOM
Vice President
Muskegon Lakeshore Chamber of Commerce
Muskegon, MI
Term: Through 2018 *as Chair of Midwest Board of Regents*

Brad Lacy, IOM, CCE
President and CEO
Conway Area Chamber of Commerce
Conway, AR
Term: Through 2018 *as Chair of West Board of Regents*

Carrie Stuart, IOM
President
Gettysburg Adams Chamber of Commerce
Gettysburg, PA
Term: Through 2018 *as Chair of Northeast Board of Regents*

At-large (two-year terms):

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

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

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

Past Chair:

Joseph B. Henning, IOM, CAE, ACE
President and CEO
Aurora Regional Chamber of Commerce
Aurora, IL
Term: 2017-2018



NOMINATIONS

2019 CURRICULUM COMMITTEE

Chair

Jeremy L. Arthur, IOM
President and CEO
Chamber of Commerce Association of Alabama
Montgomery, AL
Term: 2017-2019

Vice Chair

Matt R. McCormick, IOM, CCE
President
Columbia Chamber of Commerce
Columbia, MO
Term: 2017-2019

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

Ryan Evans, IOM
President
Utah Solar Energy Association
Draper, UT
Term: 2018-2019 *as Vice Chair of West Board of Regents*

Jeff Griffin, IOM
President and CEO
Peoria Area Chamber of Commerce & The CEO Council
Peoria, IL
Term: 2018-2019 *as Vice Chair of Midwest Board of Regents*

Robert Medler, IOM
Vice President, Government Affairs
Tucson Metro Chamber
Tucson, AZ
Term: 2018-2019 *as Vice Chair of Winter Board of Regents (confirmed February 6, 2018)*

Douglas OFlaherty, IOM
South Carolina Director of Operations
South Carolina Restaurant and Lodging Association
Columbia, SC
Term: 2018-2019 *as Vice Chair of Northeast Board of Regents*

Teri Smiley, IOM, GCCE
President
Walton County Chamber of Commerce
Monroe, GA
Term: 2018-2019 *as Vice Chair of Southeast Board of Regents*



NOMINATIONS

2019 CURRICULUM COMMITTEE

At-large (two-year term):

Lowell Aplebaum, CAE
Chief Executive Officer and Founder
Next Connexion
Gaithersburg, MD
Term 2018-2020

Jodie Perry, IOM, CCE, CCEO-AP
President
Richland Area Chamber of Commerce
Mansfield, OH
Term: 2018-2020

Term Renewals (two-year term):

Timothy M. McKee, IOM
Chief Executive Officer
Olathe Chamber of Commerce
Olathe, KS
Term: 2014-2020

Jacqueline Rakers, IOM, PFMM
Executive Director
Illinois Association of Mutual Insurance Companies
Ohlman, IL
Term: 2016-2020

Faculty Member (two-year term):

Nika White, IOM, CDE
President and CEO
Nika White Consulting
Greenville, SC
Term: 2018-2020

REMAINING ON COMMITTEE, NO ACTION REQUIRED

Standing:

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



NOMINATIONS

2019 CURRICULUM COMMITTEE

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

Faculty Member (two-year term):

Steven Swafford, IOM, Ed.D.
Balance Warrior and CEO
Leadership Outfitters
Santa Monica, CA
Term: 2015-2019

At-large (two-year term):

Desiree Bennyhoff, IOM, ACE
President and CEO
Edwardsville/Glen Carbon Chamber of Commerce
Edwardsville, IL
Term: 2017-2019

Catherine S. Dority, IOM
Director of Marketing
Charleston Area Convention and Visitors Bureau
Charleston, SC
Term: 2013-2019

Kelle Marsalis, IOM, CCE
Vice President, Strategic Initiatives
Dallas Regional Chamber
Dallas, TX
Term: 2017-2019

Allison B. Walden, IOM, CFRE
Senior Vice President of Resource Development
Tulsa Regional Chamber
Tulsa, OK
Term: 2017-2019



NOMINATIONS

2019 CURRICULUM COMMITTEE

Morri Yancy, IOM
President
Lake Guntersville Chamber of Commerce
Guntersville, AL
Term: 2015-2019

ROTATING OFF COMMITTEE

At-Large:

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

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

Tony Felker, IOM, CCE
President and CEO
Frisco Chamber of Commerce
Frisco, TX
Term: 2017-2018 *as Vice Chair of West Board of Regents*

Nick Kieffer, IOM, CP
President and CEO
Goshen Chamber of Commerce
Goshen, IN
Term: 2017-2018 *as Vice Chair of Winter Board of Regents (confirmed February 6, 2018)*

Christine Kennedy, IOM, CCE, CPC, ELI-MP
Chief Operating Officer and Executive Vice President
Lynchburg Regional Business Alliance
Lynchburg, VA
Term: 2017-2018 *as Vice Chair of Southeast Board of Regents*

Peter J. McNamara, IOM, CAE, J.D.
President
New Hampshire Automobile Dealers Association
Concord, NH
Term: 2017-2018 *as Vice Chair of Northeast Board of Regents*



NOMINATIONS

2019 CURRICULUM COMMITTEE

Angela Whitcomb, IOM
President and CEO
Shakopee Chamber of Commerce
Shakopee, MN
Term: 2017-2018 *as Vice Chair of Midwest Board of Regents*

Faculty Member (two-year term):

Brian Baker
General Manger
Mayacamas Vineyards
Napa, CA
Term: 2014-2018



NOMINATIONS

2019 MIDWEST BOARD OF REGENTS

Chair

Angela Whitcomb, IOM
President
Shakopee Chamber of Commerce
Shakopee, MN
Term: 2018-2019

Vice Chair

Jeffrey Griffin, IOM
President and CEO
Peoria Area Chamber of Commerce and The CEO Council
Peoria, IL
Term: 2018-2019

Past Chair

Dawn Johnson, IOM
Vice President
Muskegon Lakeshore Chamber of Commerce
Muskegon, MI
Term: 2018-2019

The following individuals are nominated:

Jason Ball, IOM, CEcD
President
Sioux Falls Area Chamber of Commerce
Sioux Falls, SD
Term: 2018-2020

Desiree M. Bennyhoff, IOM, ACE
President and CEO
Edwardsville/Glen Carbon Chamber of Commerce
Edwardsville, IL
Term: 2018-2020

Corey Hutcherson, IOM
Director of Membership
Wake Forest Area Chamber of Commerce
Wake Forest, NC
Term: 2018-2020



NOMINATIONS

2019 MIDWEST BOARD OF REGENTS

Term Renewals (two-year term):

Jenna Armstrong, IOM
Chief Executive Officer
Lake Houston Area Chamber of Commerce
Humble, TX
Term: 2016-2020

William T. Fleming, IOM
Executive Director
Pekin Area Chamber of Commerce
Pekin, IL
Term: 2016-2020

Lisa Hoyt, IOM
Membership Director
Petoskey Regional Chamber of Commerce
Petoskey, MI
Term: 2014-2020

Lisa Weitzel, IOM, CAE
President
Illinois Association of Chamber of Commerce Executives
Springfield, IL
Term: 2016-2020

REMAINING ON BOARD, NO ACTION REQUIRED

Heidi Gullickson, IOM
Executive Director
Brookings Area United Way
Brookings, SD
Term: 2015-2019

Tracey Halliday, IOM
Vice President, Communications
American Beverage Association
Washington, DC
Term: 2015-2019

Andrew Johnston, IOM
Vice President, Government and Corporate Affairs
Grand Rapids Area Chamber of Commerce
Grand Rapids, MI
Term: 2017-2019



NOMINATIONS

2019 MIDWEST BOARD OF REGENTS

Peter Murphy, IOM
President and CEO
Illinois Association of Park Districts
Springfield, IL
Term: 2017-2019

Jodie A. Perry, IOM, CCE, CCEO-AP
President
Richland Area Chamber of Commerce
Mansfield, OH
Term: 2013-2019

Heidi Zich, IOM
Executive Vice President
Home Builders Association of the Fox Cities
Appleton, WI
Term: 2015-2019



NOMINATIONS

2019 SOUTHEAST BOARD OF REGENTS

Chair

Christine Kennedy, IOM, CCE, CPC, ELI-MP
President
Lynchburg Regional Business Alliance
Lynchburg, VA
Term: 2018-2019

Vice Chair

Teri H. Smiley, IOM, GCCE
President
Walton County Chamber of Commerce
Walton, GA
Term: 2018-2019

Past Chair

Bryan Daniels, IOM, CCE, CEcD
President and CEO
Blount Partnership
Maryville, TN
Term: 2018-2019

The following individual is nominated:

Heath Taylor, IOM
President and CEO
Dublin-Laurens Chamber of Commerce
Dublin, GA
Term: 2018-2020

Term Renewals (two-year term):

Rita Berry, IOM, CCEC
President and CEO
Greater Summerville/Dorchester County Chamber of Commerce
Summerville, SC
Term: 2014-2020

Elisabeth Deville, IOM
Vice President, Finance and Administration
SWLA Alliance
Lake Charles, LA
Term: 2016-2020



NOMINATIONS

2019 SOUTHEAST BOARD OF REGENTS

Henry Florsheim, IOM
President and CEO
Wichita Falls Chamber of Commerce
Wichita Falls, TX
Term: 2016-2020

Pammie Jimmar, IOM
Small Business and Events Director
Chamber of Commerce of Huntsville/Madison County
Huntsville, AL
Term: 2016-2020

Allison B. Walden, IOM, CFRE
Senior Vice President of Resource Development
Tulsa Regional Chamber
Tulsa, OK
Term: 2016-2020

REMAINING ON BOARD, NO ACTION REQUIRED

Skip Alford, IOM, FCCP
President and CEO
Greater Palm Harbor Chamber of Commerce
Palm Harbor, FL
Term: 2017-2019

Elizabeth Horton, IOM
Senior Vice President of Operations
Greenville Chamber of Commerce
Greenville, SC
Term: 2013-2019

Michelle Kiely, IOM
Vice President of Development
Knoxville Chamber of Commerce
Knoxville, TN
Term: 2017-2019

Beth Morrison, IOM
Vice President of Member Services
Greater Dalton Chamber of Commerce
Dalton, GA
Term: 2017-2019



NOMINATIONS

2019 SOUTHEAST BOARD OF REGENTS

Rick Roden, IOM
President and CEO
Greater Jackson County Chamber of Commerce
Scottsboro, AL
Term: 2015-2019

Carlton Tidwell, IOM
President
Terrell Chamber of Commerce
Terrell, TX
Term: 2017-2019

Raymund Villegas, IOM
Vice President and COO
Seminole County Regional Chamber of Commerce
Heathrow, FL
Term: 2015-2019

Scott Waller, IOM
President and CEO
Mississippi Economic Council
Jackson, MS
Term: 2013-2019

ROTATING OFF BOARD

Kimberly Dahlsten, IOM
Vice President, Operations
Catawba County Chamber of Commerce
Hickory, NC
Term: 2012-2018



NOMINATIONS

2019 WEST BOARD OF REGENTS

Chair

Tony Felker, IOM, CCE
President and CEO
Frisco Chamber of Commerce
Frisco, TX
Term: 2018-2019

Vice Chair

Ryan Evans, IOM
President
Utah Solar Energy Association
Salt Lake City, UT
Term: 2018-2019

Past Chair

Brad Lacy, IOM, CCE
President and CEO
Conway Area Chamber of Commerce
Conway, AR
Term: 2018-2019

The following individuals are nominated:

Erica Mulder, IOM
Vice President of Governmental Affairs and Communications
Greater Irving-Las Colinas Chamber of Commerce
Irving, TX
Term: 2018-2020

Kuma Roberts, IOM
Executive Director of Talent Attraction, Retention and Mosaic
Tulsa Regional Chamber
Tulsa, OK
Term: 2018-2020

Nicholas R. Williams, IOM
Chief Executive Officer
Salem Area Chamber of Commerce
Salem, OR
Term: 2018-2020



NOMINATIONS

2019 WEST BOARD OF REGENTS

Term Renewals (two-year term):

Jim Johnson, IOM
President and CEO
Georgetown Chamber of Commerce
Georgetown, TX
Term: 2016-2020

Gene Terry, IOM, CAE
Executive Director, American Society of Hand Therapists
Association Headquarters, Inc.
Mt. Laurel, NJ
Term: 2016-2020

Jennifer Reiser, IOM
Chief Operating Officer
Billings Area Chamber of Commerce
Billings, MT
Term: 2016-2020

Katie Stice, IOM, ACE
Chief of Staff
Greater Coachella Valley Chamber of Commerce
Indio, CA
Term: 2016-2020

REMAINING ON BOARD, NO ACTION REQUIRED

Juliet Abdel, IOM
President and CEO
Westminster Chamber of Commerce
Westminster, CO
Term: 2017-2019

Jason E. Camis, IOM
President and CEO
Gardner Edgerton Chamber of Commerce
Gardner, KS
Term: 2015-2019

Lisa Hermes, IOM, CCE
President
McKinney Chamber of Commerce
McKinney, TX
Term: 2015-2019



NOMINATIONS

2019 WEST BOARD OF REGENTS

Kelle Marsalis, IOM, CCE
Vice President, Strategic Initiatives
Dallas Regional Chamber of Commerce
Dallas, TX
Term: 2013-2019

Robert Newman, IOM, CAE
Vice President and Chief Financial Officer
Independent Film and Television Alliance
Los Angeles, CA
Term: 2017-2019

Heidi Peterson, IOM
Manager, Marketing and Membership
Wyoming Taxpayers Association
Cheyenne, WY
Term: 2015-2019

ROTATING OFF BOARD

William Cobb, IOM
President and CEO
Greater Bentonville Chamber of Commerce
Bentonville, AR
Term: 2017-2019

Thane Phelan, IOM
Term: 2017-2019



NOMINATIONS

2019 NORTHEAST BOARD OF REGENTS

Chair

Peter J. McNamara, IOM, CAE, J.D.
President
New Hampshire Automobile Dealers Association
Concord, NH
Term: 2018-2019

Vice Chair

Douglas O'Flaherty, IOM
South Carolina Director of Operations
South Carolina Restaurant and Lodging Association
Columbia, SC
Term: 2018-2019

Past Chair

Carrie Stuart, IOM
President
Gettysburg Adams Chamber of Commerce
Gettysburg, PA
Term: 2018-2019

The following individuals are nominated:

Amy Hager, IOM, CAE
Account Executive
Associated General Contractors of America
Arlington, VA
Term: 2018-2020

Matt Myers, IOM
Marketing and Communications Manager
North Central Massachusetts Chamber of Commerce
Fitchburg, MA
Term: 2018-2020



NOMINATIONS

2019 NORTHEAST BOARD OF REGENTS

Term Renewals (two-year term):

Marvin Bond, IOM, CCE
Vice President, Investor Relations
Greater Irving-Las Colinas Chamber of Commerce
Irving, TX
Term: 2016-2020

Dan Lemyre, IOM, CAE
Executive Director, Society for Biomaterials
Association Headquarters, Inc.
Mt. Laurel, NJ
Term: 2014-2020

Jacqueline Lovejoy, IOM
President
Dearborn Area Chamber
Dearborn, MI
Term: 2016-2020

Patricia A. Montgomery, IOM, CAE
Managing Director, Executive and Board Operations
American Society of Civil Engineers
Reston, VA
Term: 2016-2020

Robert Uhler, IOM, CAE
Community Development Director
City of Fort Scott
Fort Scott, KS
Term: 2016-2020

REMAINING ON BOARD, NO ACTION REQUIRED

Steve Clark, IOM, J.D., CFE
President and CEO
Fayetteville Chamber of Commerce
Fayetteville, AR
Term: 2013-2019

Kate Conroy, IOM
Director, Member Services and Programs
New Jersey Business & Industry Association
Trenton, NJ
Term: 2015-2019



NOMINATIONS

2019 NORTHEAST BOARD OF REGENTS

Cheryl Kuhn, IOM
President and CEO
Southern Chester County Chamber of Commerce
West Grove, PA
Term: 2017-2019

Michael Smith, IOM, CAE, CPA
Vice President, Finance and Operations
Solar Energy Industries Association
Washington, DC
Term: 2017-2019

ROTATING OFF BOARD

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

Elizabeth Knowlton, IOM, CCE
Executive Director of Economic Development
City of DeRidder
DeRidder, LA
Term: 2015-2019



CONSENT AGENDA

WINTER CHAIRMAN'S REPORT, FALL 2018

I'd like to start off my report by acknowledging that the Winter Chairman's Report is a little different. Since we follow a different schedule, I get to talk about Stephanie Parton, IOM, CAE and the job she did leading our team this past January in Tucson. This being said...

I would like to take the time and thank the rest of the Winter Board of Regents. As chair, one of Stephanie's goals was to deliver excellent customer service to our attendees, and we were tested in that area. 2018 Winter came with many "opportunities" to deliver such great service, and the entire board stepped up and delivered. Raymond, Caitlin, and Andrew – thank you for everything during the week, Karyn – we did miss you a little 😊.

The final attendance numbers are as follows:

- First-Year Attendees: 60, compared to the goal of 66
- Overall Enrollment: 248, compared to the goal of 223
- Association Representation: 24.6%, compared to the goal of over 30%

The final fundraising numbers for the 2018 Winter site are as follows:

- On-Site Silent Auction raised \$6,075.67
- 5K Scholarship Run raised \$2,158
- On-site donations raised \$620
- Total: \$8,853.67, compared to the goal of \$10,000

A long tradition for the Winter Board is our email communications throughout the year. Short, concise emails were sent to board members every Wednesday with a variety of content and will continue until we are on-site in January. Andrew and the team put out great social media resources throughout the year that we strongly encourage everyone on our board to share in their peer groups in recruitment.

Class Advisors, as we all know, play a tremendous role in the attendee experience and how the week progresses. Our slate of Class Advisors in 2018 were phenomenal and they handled our "opportunities" extremely well. Pairing our regents with Class Advisors as Regent Partners has proved to be extremely helpful in creating a great experience.

The Winter site leads the other sites as the first location of the year. In addition to sharing our feedback, our Board of Regents is constantly looking for the best practices and ideas that have made great impact on other sites' attendees throughout the summer. We will head into 2019 experiencing our first Institute without an official Sunday Kickoff program, so to the other boards – we are open to how you handled this throughout the summer and what worked well for your attendees.

As for best practices, I would like to point out a change that one of our board members implemented this year that I think will make difference come this January. Robert Medler, Vice Chair, took the recruitment of Class Advisors and really made some significant changes to that process. While collecting names of interested volunteers, Mr. Medler turned the script on that list. He created a preliminary questionnaire for potential volunteers focusing on why they wanted to be a part of the program. In those questions, the



CONSENT AGENDA

WINTER CHAIRMAN'S REPORT, FALL 2018

guidelines and expectations for serving in the Class Advisor role were laid out, thus creating a more efficient vetting process. We are here today, with our 2019 Winter slate of Class Advisors already on board, and in communication with them as registration comes in.

Continuing to look at 2019 Winter, our goals have been set and we are working diligently to exceed them. Our attendance goals are set at 240 overall, 63 of which are first-years, and over 30% association representation. Our fundraising goal is set at \$10,000. Our team is already in the process of executing our plans and are eagerly looking forward to January.

We, as the Winter Board of Regents, would like to thank Raymond, Karyn, and entire staff for how hard they worked this past year and made the best of the “opportunities” that we were given.

Submitted by: Nick Kieffer, IOM, CP
Chair, Winter Board of Regents



CONSENT AGENDA

MIDWEST CHAIRMAN'S REPORT, FALL 2018

I am very happy and honored to be reporting the activities of the 2018 Midwest Institute at the University of Wisconsin in Madison. The board and I are thrilled to let you know our year was extremely smooth and successful.

The Madison campus attendee enrollment has been increasing over the past few years, with us meeting or exceeding goals. This year was no different! We had an overall goal of 145, with 47 first-years and we finished with 147 overall, with 37 first-years. This will hopefully continue to grow as the years go on.

Helping to create the overall success of the week, there were two accomplishments I would consider our biggest successes.

1. **The seamless transition of the elimination of the Kickoff Reception Event.** The Madison campus was the first location to not hold an official reception, although we did still have the speaking portion of Kickoff. The Class Advisors took charge and made sure the classes connected on the first day. There was initial concern amongst our board that the first-years may not get the welcoming experience that the official reception created. However, our first-year advisors did a great job creating an organic first-year only gathering to get their week off to a great start. Attendees not only formed solid connections amongst themselves, but our Board of Regents made a point to participate with them as well. There was great interaction between the two groups.
2. **Exceeding our fundraising goal by 20%.** The goal was \$5,500 and we raised \$6,840 on-site to go towards scholarships. A big thank you to Jodie Perry, Bill Fleming, and Lisa Weitzel for stepping up and handling the auction so successfully. Class donations made up the bulk of the success, fourth-year donations specifically. Over the past few years, there has been a tradition for the graduates to try and raise more money than was raised amongst the previous year's grads, and this year's fourth-year class was very successful!

Our biggest challenge was recruiting first-year attendees. The recruitment plan was for board members to reach out to their graduating classes, prospect lists, and lists of past grads sent out by the IOM staff. This plan worked for overall numbers, but I wonder if the elimination of Regent Scholarships had an effect on the first-year enrollment numbers.

Next year will be at the helm of incoming chair, Angie Whitcomb, IOM from the Shakopee Chamber & Visitors Bureau. She will continue to build and expand upon what has been started for recruiting and marketing. The board has asked staff for lists of potential attendees, as well as past graduates to contact with personal invitations to attend. There will also be a focused attention on partnering with the State Associations to encourage attendance and participation. In addition, we hope to implement a new strategy involving the graduates, by asking them to assist with recruitment efforts by encouraging their staff to attend, as well as utilizing state and local connections to participate. As we all know, graduates are the best walking testimonials.

Our on-site social media plan was a structured plan, complete with calendar reminders for board members to post on different platforms prior to, during, and after the Institute week. Thank you to Jenna Armstrong for leading this effort remotely, and to the board for taking the time to make sure they



CONSENT AGENDA

MIDWEST CHAIRMAN'S REPORT, FALL 2018

completed their roles. Also included in the plan was an Instagram photo challenge, which offered a lot of fun and was a great way to get to know the Madison area. As we move into next year's planning, this will remain a focus. We will continue with the scheduled posts on several social media sites, as well as create more social media engagement among the participants.

Thank you for the opportunity to participate in this important professional development program. It has been an honor to be the Board Chair for the Midwest Board of Regents. They are a phenomenal group of people to work with. I'm pleased to be handing things off to Angie Whitcomb, as she will be a wonderful leader!

Submitted by: Dawn Johnson, IOM
Chair, Midwest Board of Regents



CONSENT AGENDA

SOUTHEAST CHAIRMAN'S REPORT, FALL 2018

As chairman of Southeast Institute, I am pleased to submit the following report to the Board of Trustees. Southeast continues to be one of the largest and most enthusiastic educational sites within the Institute program. Increasing attendance is an overarching yearly goal of Institute and this year the mark was set at 260, which would top the 2017 total of 248. The final count was 240, which was 93% of the goal. The largest shortfall was with first-year attendees. The goal was to recruit 93 first-year attendees and we nearly hit the mark with 80. However, we exceeded our goal in third- and fourth-year attendees. Seeing the large number of people that continue and graduate shows that the programming works, as attendees continue to build solid careers in the profession.

Additionally, the Southeast Institute Board of Regents is comprised of accomplished non-profit leaders who take time to mentor attendees and are actively engaged in professional development. You can feel the energy these compassionate leaders display towards each student's development. Our registration areas, breaks, and after-hours discussion groups are filled with music, laughter, inquisitive discussion, and supportive mentorship. We saw an increase in the number of students who reached out for one-on-one industry consultations with our regents. 41 attendees received sound supportive advice for the challenges they were facing.

Even though we saw across-the-board success, our biggest achievements were in two areas. Our fundraising efforts netted \$7,411.26 for scholarships and the 45 Ideas in 45 Minutes brainstorming bonus session was wildly popular. Southeast attendees have consistently given resources to help uplift their fellow practitioners and this year was no exception. Our 45 Ideas in 45 Minutes' winning idea was utilizing Snapchat filters during high school football games.

One of the biggest challenges continues to be attendee diversification at the Southeast site. The Southeast location is populated with mostly chambers of commerce within a 500-mile radius, thus trade associations are very small in numbers at our location. We engaged with several national and state associations to encourage their membership to attend Southeast. We would like to see the U.S. Chamber Foundation continue to try a variety of communication methods with these groups to increase association representation at Southeast.

Moving forward under Christine Kennedy's leadership in 2019, the Southeast Board of Regents plan to make Institute a priority in the minds of busy professionals by cutting through the noise of mass communications. This will be accomplished by emphasizing our southern hospitality of getting to know our colleagues. Southeast is successful because we are warm, friendly, and personal. Thus, we will emphasize the power of the personal story. Because business IS personal. Institute IS personal. We will challenge each other to schedule just 30 minutes on a reoccurring basis to do personal outreach and to share personal stories on how Institute can make a difference in your life. This will include personal emails, phone calls, and tagging professional contacts on social media when you tell a story.

Posting on the different social media platforms continues to be the primary tool the Southeast Board of Regents employ to engage attendees. Our board and Class Advisors were outstanding at posting testimonials regarding how the Institute program shaped and advanced their careers. These posts demonstrated the value of Institute and the caliber of attendees that were coming to Southeast. We also



CONSENT AGENDA

SOUTHEAST CHAIRMAN'S REPORT, FALL 2018

saw many graduates posting and encouraging new professionals to seek training in Athens. These posts were on Facebook, Twitter, YouTube, and Instagram. We encourage social media engagement for next year to begin in the fall as many organizations are putting together their 2019 budgets. This could help remind many of those professionals who need training the importance and impact that Institute can have on their lives and the availability of scholarships.

I commend the U.S. Chamber Foundation team for sticking with the changes to the schedule that allowed for an accelerated week of learning. These changes allowed attendees to receive the training needed while returning them to their professional and family obligations in a timely manner.

I am very grateful for the opportunity provided by the U.S. Chamber Foundation, the Southeast Board of Regents, and the staff. This has been one of the best career highlights of my life. The future of Southeast Institute is in great hands.

Submitted by: Bryan Daniels, IOM, CCE, CEcD
Chair, Southeast Board of Regents



CONSENT AGENDA

WEST CHAIRMAN'S REPORT, FALL 2018

On behalf of the West Board of Regents, I am pleased to give an overview from our 2018 program. As usual, our attendees experienced an incredible week of professional development and relationship building at Loyola Marymount University in July.

West Institute hosted a total of 97 attendees this year, 31 of which were first-year students, compared to the goal of 98 total, with 31 first-years. These attendees represented 27 different states. While our board was pleased with our final numbers, we had agreed to a “stretch” goal of 115. Recruitment continues to be a challenge, but we have several ideas that we want to develop that should help us increase attendance.

In 2017, the board identified several strategies to increase enrollment and remains committed to them for the future. The two strategies best suited for our site include a focus on metro chamber staff and utilizing a more geographically and industry diverse Board of Regents. We believe that metro chambers are a great untapped resource for the program, and the Los Angeles location is a natural gathering place for those professionals. Through our board, we will continue to target metro chamber staff from around the country and personally recruit metro cohorts in each first-year class.

Our Board of Regents is now diverse by almost every metric. Specifically, we have 15 current members representing 10 states; 11 from chambers and 4 from associations; and 9 male vs. 6 female. We are proud to report the number of association attendees in the first-year class increased from 4 in 2017 to 11 in 2018.

Our biggest success this year was once again our fundraising efforts. Fundraising via our auction is a strong tradition at this site and 2018 proved to be another very successful year. We received 53 items from attendees and board members, and I am happy to report our final total was \$10,425.84. Thanks to our very talented auctioneer and regent, we had a lot of fun and a large portion of that total was raised from our live auction alone.

We heard a lot of feedback regarding the elimination of the Sunday night event and the need to have something planned as an option for attendees. Not only was the networking reception missed, but also the speaking portion of the event, where everyone gathers together as one group. The board is exploring activities that we would organize to allow attendees to “opt-in” for an evening activity, and staff has confirmed that the speaking portion will return.

Our biggest issue for 2019 is the current timing of the ACCE Annual Conference, which currently coincides with our West Institute schedule. This would be detrimental to attendance for 2019. Institute staff is working with Loyola Marymount at a possible adjustment to the schedule, which would fix the problem.

I am pleased to welcome Tony Felker, IOM, CCE, with the Frisco (TX) Chamber, as chair and Ryan Evans, IOM with the Utah Solar Energy Association, as vice chair. They will do an amazing job.

Submitted by: Brad Lacy, IOM, CCE
Chair, West Board of Regents



CONSENT AGENDA

NORTHEAST CHAIRMAN'S REPORT, FALL 2018

2018 was another fantastic year at Villanova University for Northeast Institute. Enrollment was slightly under the goal of 167 total attendees, with 52 being first-year, as we finished with 150 total, 45 of which were first-years.

There were two big successes of particular note. First, our new Ambassador program. The purpose of establishing this new volunteer component was to help first-year and first-time Villanova attendees feel welcomed to the campus and provide additional direction when arriving. We engaged returning third- and fourth-year attendees to assist regents with this initiative, thus opening the doors to engage them in future years, either as Class Advisors or members of the Board of Regents.

Additionally, our "Institute Stars" fundraiser was an overwhelming success again this year. The 2017 third-year class made it a goal of theirs to raise enough money to offer a full scholarship from their class and they met that goal! This fueled donations amongst the other classes. Volunteers engaged in some friendly banter throughout the week with attendees, resulting in \$1,565.00 raised through the sale of stars.

By far, our biggest challenge was overcoming the lack of an organized Sunday evening event to reconnect returning attendees and welcome first-year attendees. Although the Board of Regents made an attempt to provide a similar atmosphere at a local restaurant, it fell short in accomplishing our goal. Many returning attendees missed the opportunity to meet and engage with first-year attendees, and perhaps more importantly, the first-years did not get to meet and engage with those returning and gain a sense of their passion for the program.

Going forward, we will continue to enhance our outreach to potential attendees through personal contact and social media outlets. Association involvement from outside of the Washington D.C. area continues to be an opportunity to increase enrollment. We will also discuss better utilization of current marketing materials in our outreach to Association and Chamber executives, encouraging them to send staff members, not just attending themselves.

Submitted by: Carrie Stuart, IOM
Chair, Northeast Board of Regents



DEMOGRAPHICS

REGISTRATION PROJECTIONS AND GOALS

WINTER	2018 Final	2019 Projections
Class Section		
1-1	31	32
1-2	29	31
1st year Total	60	63
2-1	30	24
2-2	36	23
2nd year Total	66	47
3-1	37	27
3-2	38	32
3rd year Total	75	59
4-1	25	35
4-2	22	36
4th year Total	47	71
Winter Total	248	240

SOUTHEAST	2018 Final	2019 Projections
Class Section		
1-1	29	29
1-2	25	29
1-3	26	28
1st yr Total	80	86
2-1	29	23
2-2	32	39
2nd yr Total	61	62
3-1	23	26
3-2	23	29
3rd yr Total	46	55
4-1	28	22
4-2	25	21
4th yr Total	53	43
SE Total	240	246

MIDWEST	2018 Final	2019 Projections
Class Section		
1-1	19	19
1-2	18	19
1st yr Total	37	38
2-1	34	29
2nd yr Total	34	29
3-1	36	31
3rd yr Total	36	31
4-1	40	34
4th yr Total	40	34
MW Total	147	132

WEST	2018 Final	2019 Projections
Class Section		
1-1	31	32
1st yr Total	31	32
2-1	21	24
2nd yr Total	21	24
3-1	21	19
3rd yr Total	21	19
4-1	24	20
4th yr Total	24	20
West Total	97	95

NORTHEAST	2018 Final	2019 Projections
Class Section		
1-1	26	23
1-2	19	23
1st yr Total	45	46
2-1	20	35
2-2	13	----
2nd yr Total	33	35
3-1	37	30
3rd yr Total	37	30
4-1	35	35
4th yr Total	35	35
NE Total	150	146

First-Year Assumptions*:

- Winter: -0.07%
- Midwest: -2.91%
- Southeast: 2.20%
- West: -1.48%
- Northeast: -3.46%

*First-year assumptions are based on overall trends from the past five years. To reach the 2019 projection, a stretch goal of 5% was added.

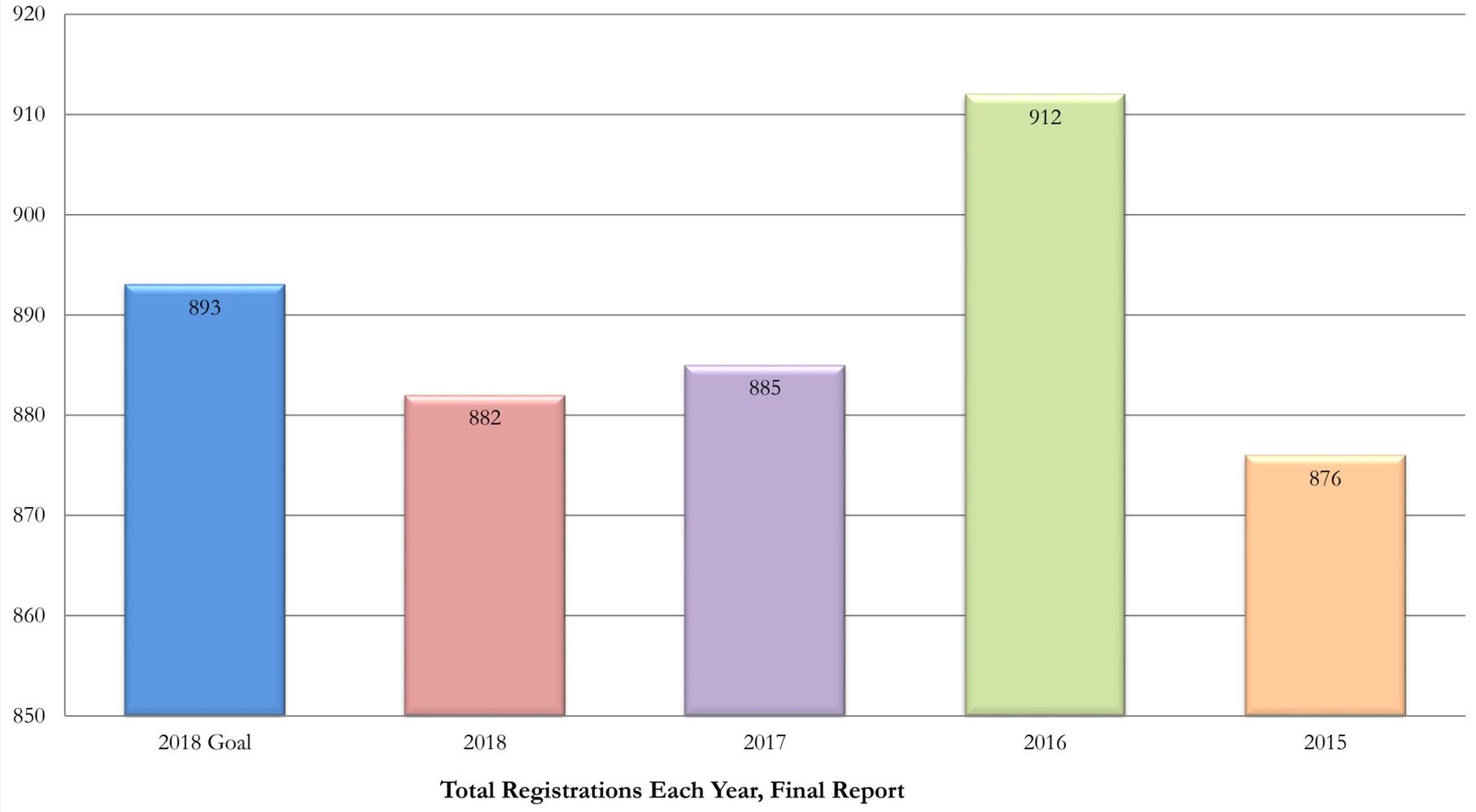
Retention Rates:

- Second-Year: 77.87%
- Third-Year: 90.01%
- Fourth-Year: 94.20%

2019 Projections:

- Overall: 859
- First-Years: 265

2015-2018 Final Institute Registrations





DEMOGRAPHICS

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

2018 DEMOGRAPHICS BY SITE

Demographic Fact Sheet					
Class Level	Winter 2018	Midwest 2018	Southeast 2018	West 2018	Northeast 2018
1st year	23.79%	25.68%	33.33%	31.96%	30.00%
2nd year	26.61%	22.97%	25.42%	21.65%	22.00%
3rd year	30.24%	24.32%	19.17%	21.65%	24.67%
4th year	18.95%	27.03%	22.08%	24.74%	23.33%
Employer	Winter 2018	Midwest 2018	Southeast 2018	West 2018	Northeast 2018
Association	25.00%	28.38%	9.58%	23.71%	48.67%
Chamber	64.52%	66.22%	86.67%	72.16%	40.67%
Other	10.89%	5.41%	3.75%	4.12%	10.67%
Age	Winter 2018	Midwest 2018	Southeast 2018	West 2018	Northeast 2018
21 – 30	12.90%	16.89%	19.58%	14.43%	14.67%
31 – 40	34.27%	35.14%	30.00%	35.05%	38.67%
41 – 50	29.44%	30.41%	30.83%	29.90%	26.67%
51 +	23.39%	17.57%	19.58%	20.62%	20.00%
Ethnicity*	Winter 2018	Midwest 2018	Southeast 2018	West 2018	Northeast 2018
*Question not required (answers may not total 100%)					
Caucasian	81.45%	91.22%	90.00%	78.35%	82.00%
Other Ethnicity	12.90%	6.76%	7.50%	20.62%	16.00%
Years of Experience in Association/Chamber Field	Winter 2018	Midwest 2018	Southeast 2018	West 2018	Northeast 2018
Less than 2 years	8.06%	9.46%	10.83%	12.37%	2.67%
2 to 5 years	24.60%	30.41%	39.58%	28.87%	27.33%
6 to 10 years	30.24%	25.00%	24.17%	19.59%	26.67%
More than 10 years	37.10%	35.14%	25.42%	39.18%	43.33%
How Did You Learn About Institute?*	Winter 2018	Midwest 2018	Southeast 2018	West 2018	Northeast 2018
*Attendees had opportunity to choose more than one option					
Employer	57.26%	54.05%	69.17%	56.70%	54.67%
Colleague	27.02%	32.43%	22.08%	30.93%	29.33%
State Conference	6.45%	7.43%	5.42%	0.00%	0.00%
Direct Mail	0.00%	0.00%	0.00%	1.03%	0.00%
Email	2.42%	2.03%	1.67%	1.03%	0.00%
Website	3.23%	0.68%	1.67%	2.06%	2.67%
Other	3.63%	3.38%	0.00%	8.25%	0.00%



DEMOGRAPHICS

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

2018 DEMOGRAPHICS BY SITE

Organization's Budget Size <i>(excluding Public Funds)</i>	Winter 2018	Midwest 2018	Southeast 2018	West 2018	Northeast 2018
Less than \$100,000	4.44%	3.38%	4.58%	1.03%	0.67%
\$100,001 - \$250,000	13.71%	8.78%	17.08%	7.22%	8.00%
\$250,001 - \$500,000	18.15%	18.24%	19.58%	13.40%	12.00%
\$500,001 - \$1,000,000	20.56%	23.65%	24.17%	21.65%	20.67%
\$1,000,001 - \$3,000,000	16.13%	19.59%	15.42%	31.96%	20.00%
\$3,000,001 - \$5,000,000	8.47%	4.05%	7.08%	8.25%	9.33%
\$5,000,001 - \$10,000,000	6.45%	10.14%	7.92%	4.12%	10.67%
Greater than \$10,000,001	12.10%	12.16%	4.17%	12.37%	18.67%
Organization's Staff Size					
	Winter 2018	Midwest 2018	Southeast 2018	West 2018	Northeast 2018
Less than 3	14.92%	12.16%	20.83%	10.31%	14.00%
3 to 10	47.58%	48.65%	48.75%	44.33%	35.33%
11 to 25	17.34%	16.89%	13.75%	25.77%	22.00%
26 to 50	6.45%	9.46%	11.67%	11.34%	6.00%
51 to 100	6.45%	6.08%	1.67%	4.12%	10.00%
More than 100	7.26%	6.76%	3.33%	4.12%	12.67%
Level of Responsibility					
	Winter 2018	Midwest 2018	Southeast 2018	West 2018	Northeast 2018
CEO / Executive Director	35.89%	31.08%	34.58%	23.71%	26.00%
Senior Executive / Department Director	40.32%	37.16%	37.92%	44.33%	41.33%
Manager	13.31%	20.27%	17.50%	12.37%	21.33%
Coordinator / Assistant/ Other	10.48%	11.49%	10.00%	19.59%	11.33%
Primary Job Responsibility					
	Winter 2018	Midwest 2018	Southeast 2018	West 2018	Northeast 2018
Membership	16.13%	19.59%	19.58%	18.56%	13.33%
General Management	46.77%	37.84%	41.67%	38.14%	38.00%
Marketing	10.08%	8.78%	9.58%	13.40%	18.67%
Finance	3.63%	5.41%	3.75%	5.15%	4.00%
Government Relations	6.05%	7.43%	5.42%	5.15%	8.00%
Other	17.34%	20.95%	20.00%	19.59%	18.00%



YEAR IN REVIEW

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

MARKETING UPDATE

In 2018, Institute's marketing efforts were advanced through the hard work and collaboration of the volunteers and the Institute staff. Below is an overview of our marketing accomplishments and endeavors for your review. Our main goal was to create new forms of marketing the Institute classroom experience online and outlets for promotion of the organization.

Advertisements:

- Monthly video testimonials that give a quick, in-depth look into the benefits of Institute have been popular on social media this year. We plan on continuing these efforts by creating more videos in the coming months.
- ACCE's *Chamber Executive* magazine has been an important medium for us to advertise past Institute testimonials and upcoming registration dates. Multiple half-page and full-page ads have been placed in the magazine. The focus of the ads included Institute summer registration, scholarship deadlines, and other testimonials and photos highlighting the Institute program.
- Our "dates and deadlines" postcard was updated with the new 2018 sites and dates, and this postcard was placed in the post-site thank you letters sent to Institute attendees. It was also printed and mailed to state conferences with other marketing pieces.
- The Institute planner is our largest and most prominent advertisement. It is distributed to all Institute attendees at registration and also included in conference shipments all around the country, including regional Chamber offices. This planner contains a calendar that people use throughout the year and is a "walking advertisement."
- A web banner advertisement with the summer registration dates and an Institute alumni testimonial was featured on the ASAE website for three months before summer registration. This prominent placement was guaranteed to get us thousands of impressions and will continue in 2019 as well.

Promotional Materials:

- Institute sent blue tablecloths with our logo and hashtag to different conferences. They were also utilized by staff at larger conferences such as W.A.C.E. and MAKO. These bright, eye-catching pieces are easy to transport and also market our social media presence.
- The blue tote bags given to attendees with their planner during registration were well received. We have distributed water bottles in past years, and post-site surveys mentioned their removal, so we may bring them back.
- Institute screen cleaners, featuring a testimonial from Institute board members and alumni, have been included in the 20+ conference shipments so far this year. They are a unique item and printing them in full-color makes them an attractive collateral piece easy to take home from an event.
- Attendees receive an Institute branded metal alloy pen on-site. This pen writes very well and is used by attendees post-site. It is also included in state conference shipments.



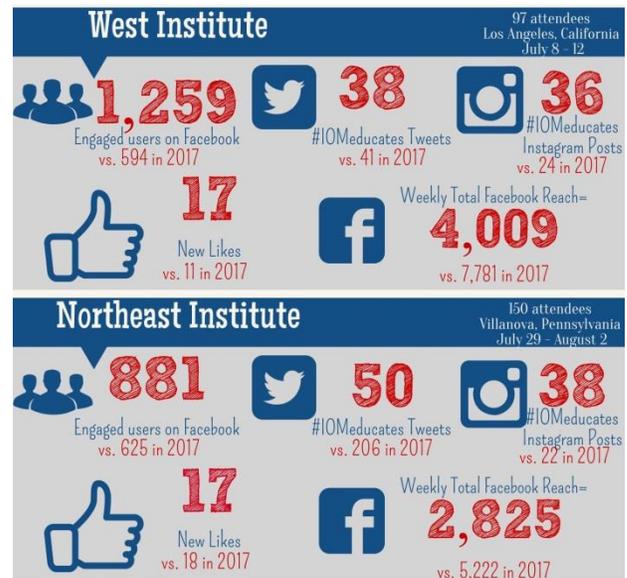
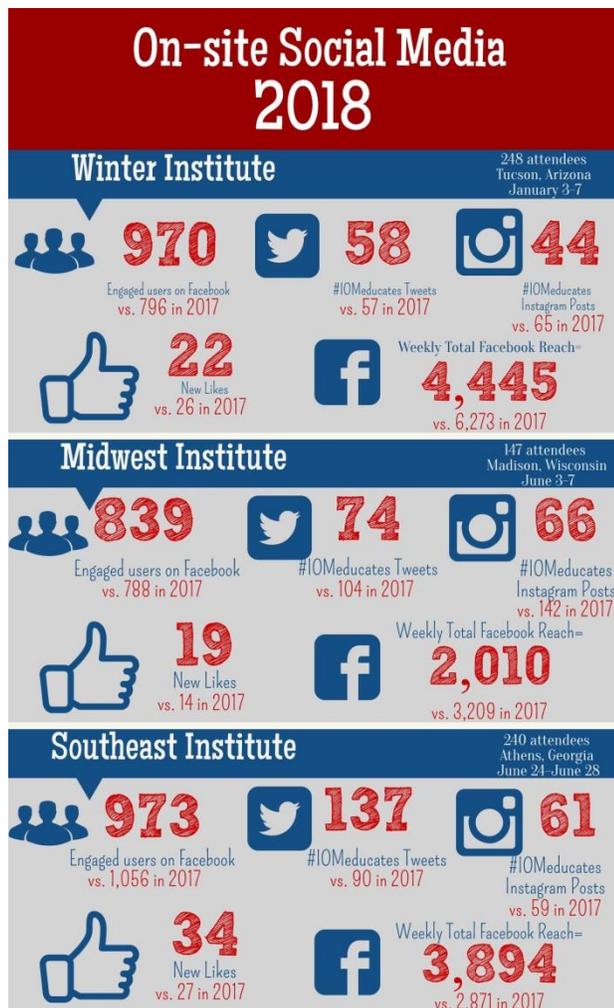
YEAR IN REVIEW

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

SOCIAL MEDIA UPDATE

	2017*	2018*	Percentage Increase
Facebook	2,699 Likes	2,988 Likes	11%
Twitter	1,760 Followers	1,851 Followers	5%
LinkedIn	2,372 Members	2,440 Members	3%
Instagram	385 Followers	480 Followers	25%

*Numbers as of September 1



Institute:

- Posted #SessionSpotlight every Friday highlighting Institute core and elective courses.
- Posted #TuesdayTestimonial every week.
- Encouraged social media promotion from board members through the creation of content calendars distributed to the Board of Trustees and each Board of Regents.
- Posted on the IOM blog each week and promoted on Twitter and Facebook.



YEAR IN REVIEW

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

STATE PARTNERSHIP UPDATE

STATE PARTNER SCHOLARSHIP

- On two occasions in 2018, Institute reached out to 115 state executive societies (chamber of commerce executive societies, association executive societies, economic development councils, and convention and visitor bureaus). The first time was to encourage Winter Institute participation and the second was in regards to summer registration.
- Of the 115 organizations who were contacted, 21 participated by sharing information about the Institute program with their members.
- In total, 36 first-year participants attended Institute using a SPS scholarship; 30 chamber of commerce professionals, 3 association professionals, and 3 nontraditional partners.

MARKETING INSTITUTE TO STATE PROGRAMS THROUGH GIVEAWAYS

- Since the 2017 Fall Board meeting, Institute sent marketing materials, including branded water bottles, electronic screen cleaners, planners, and other marketing materials to 21 association executive societies, chamber of commerce executive societies, and other professional nonprofit societies.

PARTICIPATION AT STATE, ANNUAL, AND REGIONAL CONFERENCES

- Institute had a presence at three conferences in 2017: Western Association of Chamber Executives (W.A.C.E.), Mid-America Chamber Executives (MACE), and the Illinois Association of Chamber of Commerce Executives (IACCE).
- Institute doesn't anticipate increasing a presence at annual conferences in 2019 due to speakers being unavailable and conference payments being much lower than standard speaker fees, in addition to Institute's budgetary restraints. Institute is hopeful that bringing in new faculty will provide new opportunities for participation. Institute continues to participate in this program because it is valuable for the dual purposes of recruiting new attendees and reminding alumni of the impact Institute had on their careers.

W.A.C.E. PARTNERSHIP

- Institute continues to partner with the Western Association of Chamber Executives.
- Graduates of the Academy program are eligible to attend Institute as third-year attendees, bypassing their first two years of the program.
- In 2018, eight attendees started the Institute program and five completed.

Site	Third-Year	Fourth-Year
Winter	5*	1
Midwest	0	1*
West	3	3

*One attendee-fast tracked, completing her third-year at Winter and fourth-year at Midwest.



YEAR IN REVIEW

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

STATE PARTNERSHIP UPDATE

2018 STATE PARTNER SCHOLARSHIP

State	Organization	2017	2018	2018 Winter	2018 MW	2018 SE	2018 W	2018 NE
Association North	Association North	0	1	1				
	MN Academy of Ophthalmology			1				
Alabama	Chamber of Commerce Association of Alabama	3	1			1		
	Lake Guntersville Chamber of Commerce					1		
Arkansas	Arkansas State Chamber of Commerce	2	4	2		1	1	
	Paragould Chamber of Commerce			1				
	Hot Springs Chamber of Commerce			1				
	Rogers Lowell Chamber of Commerce					1		
California	California Society of Association Executives	0	1				1	
	CA Narcotic Officers' Association (CNOA)						1	
Carolinas	Carolinas Association of Chamber of Commerce Executives	2	2			2		
	Outer Banks Chamber of Commerce					1		
	Boone Chamber of Commerce					1		
Colorado	Colorado Chamber of Commerce Executives	2	1	1				
	Basalt Chamber of Commerce			1				
Florida	Florida Association of Chamber Professionals	2	3			3		
	Seminole County Chamber					1		
	Greater Tampa Chamber of Commerce					1		
	Kissimmee Osceola County Chamber of Commerce					1		
Illinois	Illinois Association of Chamber of Commerce Executives	2	4	1	3			
	Joliet Chamber of Commerce			1				
	Western DuPage Chamber of Commerce				1			
	Edwardsville Glen Carbon Chamber of Commerce				1			
	Lincoln Park Chamber of Commerce				1			
Kansas	Kansas Chamber of Commerce Executives (CCEKs)	3	1		1			
	Andover Area Chamber of Commerce				1			
Kentucky	Kentucky Chamber of Commerce Executives	0	2			1	1	
	Bardstown Nelson County Chamber of Commerce						1	
	Murray Calloway County Chamber of Commerce					1		
Maryland	Maryland Association of Chamber of Commerce Executives (MACCE)	2	2					2
	Caroline Chamber							1
	Greater Crofton Chamber							1
Michigan	Michigan Association of Chamber Professionals	2	1	1				
	Byron Center Chamber			1				
Mississippi	Mississippi Economic Development Council	2	1			1		
	Hernando Main Street Chamber of Commerce					1		
Missouri	Chamber of Commerce Executives of Missouri	2	1	1				
	Republic Chamber of Commerce			1				
Montana	Montana Chamber of Commerce Executives	1	2	2				
	Big Sky Chamber of Commerce			1				
	West Yellowstone Chamber of Commerce			1				
Oklahoma	The State Chamber of Oklahoma (OCCE)	0	2			1		1
	Greater Muskogee (OK) Chamber					1		
	Pauls Valley Chamber of Commerce							1
Pennsylvania	Pennsylvania Association of Chamber Professionals	1	1					1
	Greater Wilkes-Barre Chamber							1
Tennessee	Tennessee Chamber of Commerce & Industry	4	3			3		
	Portland Chamber of Commerce					1		
	Cocke County Partnership					1		
Vermont	Greene County Partnership					1		
	Vermont Association of Chamber of Commerce Executives	0	2					2
Wisconsin	Lake Champlain Regional Chamber of Commerce							1
	Bennington Chamber of Commerce							1
Wisconsin	Wisconsin Society of Association Executives	0	1		1			
	Wisconsin Association of Mutual Insurance Companies				1			

NUMBERS INDICATE PARTICIPATION IN SPS PROGRAM AND NUMBER OF ATTENDEES SENT



YEAR IN REVIEW

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

STATE PARTNERSHIP UPDATE

State	Organization	2017	2018	2018 Winter	2018 MW	2018 SE	2018 W	2018 NE
Association North	Association North		1	1				
Alabama	Chamber of Commerce Association of Alabama	3	1	1				
Arkansas	Arkansas State Chamber of Commerce	2	4	2		1	1	
California	California Society of Association Executives		1				1	
Carolinas	Carolinas Association of Chamber of Commerce Executives	2	2			2		
Colorado	Colorado Chamber of Commerce Executives	2	1	1				
Florida	Florida Association of Chamber Professionals	2	3			3		
Illinois	Illinois Association of Chamber of Commerce Executives	2	4	1	3			
Kansas	Kansas Chamber of Commerce Executives (CCEKs)	3	1		1			
Kentucky	Kentucky Chamber of Commerce Executives		2			1	1	
Maryland	Maryland Association of Chamber of Commerce Executives (MACCE)	2	2					2
Michigan	Michigan Association of Chamber Professionals	2	1	1				
Mississippi	Mississippi Economic Development Council	2	1			1		
Missouri	Chamber of Commerce Executives of Missouri	2	1	1				
Montana	Montana Chamber of Commerce Executives	1	2	2				
Oklahoma	The State Chamber of Oklahoma (OCCE)		2			1		1
Pennsylvania	Pennsylvania Association of Chamber Professionals	1	1					1
Tennessee	Tennessee Chamber of Commerce & Industry	4	3			3		
Vermont	Vermont Association of Chamber of Commerce Executives		2					2
Wisconsin	Wisconsin Society of Association Executives		1		1			

NUMBERS INDICATE PARTICIPATION IN SPS PROGRAM AND NUMBER OF ATTENDEES SENT



YEAR IN REVIEW

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

FUNDRAISING UPDATE

- Year to date, Institute has raised just over \$44,000 for the 2019 scholarship season.
- Institute staff, for the first time, recruited items for Institute silent auctions starting in June 2018. The items procured by staff raised \$730.00. Due to the success, Institute staff will continue to collect items through the year for onsite auctions in 2019.

2018	Winter	Midwest	Southeast	West	Northeast	Total
Funds remaining from previous year's scholarship allocation	\$0.00	\$0.00	\$0.00	\$0.00	\$500.00	\$500.00
Silent auction	\$5,464.70	\$2,645.00	\$6,834.75	\$12,204.00	\$4,290.00	\$31,438.45
2017 Registration donations	\$210.00	\$50.00	\$200.00	\$0.00	\$100.00	\$560.00
Additional on-site fundraising	\$2,702.80	\$2,320.00	\$1,140.23	\$0.00	\$2,453.00	\$8,616.03
Annual appeal (mailing)	\$270.00	\$120.00	\$445.00	\$120.00	\$195.00	\$1,150.00
Bi-annual solicitation	\$0.00	\$75.00	\$0.00	\$0.00	\$0.00	\$75.00
#GivingTuesday	\$635.00	\$637.00	\$212.00	\$217.00	\$167.00	\$1,868.00
Online store	\$11.38	\$0.00	\$0.00	\$0.00	\$0.00	\$11.38
Donate Now	\$30.00	\$30.00	\$130.00	\$30.00	\$30.00	\$250.00
\$1,000 gift from IOM	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$5,000.00
Total to allocate to 2018 sites:	\$10,323.88	\$6,877.00	\$9,961.98	\$13,571.00	\$8,735.00	\$49,468.86

2019	Winter	Midwest	Southeast	West	Northeast	Total
Funds remaining from previous year's scholarship allocation	\$1,299.00	\$0.00	\$375.00	\$1,321.00	\$440.00	\$3,435.00
Silent auction	\$6,075.67	\$3,245.00	\$6,189.07	\$10,425.84	\$4,263.00	\$30,198.58
2018 Registration donations	\$200.00	\$25.00	\$235.00	\$0.00	\$50.00	\$510.00
Additional on-site fundraising	\$2,778.00	\$3,595.00	\$1,222.19	\$0.00	\$1,565.00	\$9,160.19
Bi-annual solicitation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
#GivingTuesday	\$502.00					\$502.00
Donate Now	\$0.00	\$25.00	\$0.00	\$0.00	\$0.00	\$25.00
\$1,000 gift from IOM	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$5,000.00
Total to allocate to 2019 sites:	\$11,854.67	\$7,890.00	\$9,021.26	\$12,746.84	\$7,318.00	\$48,830.77



YEAR IN REVIEW

FACULTY UPDATE

Please note: Course evaluations are based on a five-point scale.

2018 FACULTY

Contracted with a total of 65 faculty members, of those 12 were new faculty members (18%).

- Course Evaluation Average: 4.79 (65)
 - Staff 4.44 (6)
 - Consultant 4.43 (35)
 - Practitioner 4.43 (20)
 - Expert 4.27 (4)

2017 FACULTY

Contracted with a total of 66 faculty members, of those 15 were new faculty members (23%).

- Course Evaluation Average: 4.65 (66)
 - Expert 4.60 (2)
 - Consultant 4.56 (32)
 - Practitioner 4.46 (25)
 - Staff 4.56 (6)
 - Professor 3.93 (1)

2016 FACULTY

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

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

2015 FACULTY

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

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



YEAR IN REVIEW

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

FACULTY UPDATE

Institute sponsored faculty at the following conferences:

W.A.C.E. (Western Association of Chamber Executives)

Keynote Speaker: Brian Baker

February 7-9, 2018

Henderson, NV

Number of attendees: 400

MACE (Mid-America Chamber Executives)

Keynote Speaker: Kyle Sexton

May 2-4, 2018

Sioux Falls, SD

Number of attendees: 120

IACCE (Illinois Association of Chamber of Commerce Executives)

Keynote Speaker: David Aaker

November 7-9, 2018

Peoria, IL

Number of attendees: 125 estimated



YEAR IN REVIEW

VOLUNTEER UPDATE

Congratulations to all Board of Trustees, Boards of Regents, and Curriculum Committee members on a truly successful year! A special thank you to the Board of Trustees Chair, Chris Wallace, IOM, CCE for his leadership and on-site engagement, as well as all volunteers for their continuous efforts to market the program this Institute season. Due to your hard work, the final enrollment for 2018 Institute was 882 overall attendees, 253 of which were first-years. As a point of reference, final enrollment was 885 overall and 282 first-years in 2017.

We are looking forward to a great year ahead!

Below are some highlights from 2018.

- Recruited 15 new Board of Regent members and 32 Class Advisors from various associations and chambers of commerce across the country.
- Of the 32 Class Advisors, 18 were first-time advisors.
- 312 interested volunteers in our database representing 44 states plus D.C.
- 37 states plus D.C. are currently represented on the boards and committee.
- 28 first-years were recruited from board members' organizations.
- 43 returning students were recruited from board members' organizations, compared to 37 in 2017.

BOARD MEMBER RECRUITMENT GRID

On the following pages, you will find a copy of the 2018 Board Member Recruitment Grid, which helped to monitor Institute's outreach and recruitment. Please know this document represents a very small fraction of what you do every day to market the Institute program. We know that volunteer recruitment and action is the key to our success, and we thank you for all you do.

2018 Volunteer Recruitment Grid

First Name	Last Name	Organization	Locaiton	First-Years Recruited from Same Organization	Returning Students from Same Organization	First-Years Recruited from Other Organization
Juliet	Abdel	Westminster Chamber of Commerce	West			
Jeff	Albright	PA Chamber of Business and Industry	Northeast		Jewell Lester (4-Northeast)	
Jerry	Alford	Greater Palm Harbor Chamber of Commerce	Southeast			
Jenna	Armstrong	Lake Houston Area Chamber of Commerce	Midwest			
Jeremy	Arthur	Chamber of Commerce Association of Alabama	CC, BOT			
Steve	Baas	Metropolitan Milwaukee Association of Commerce	Winter		Andrew Davis (2-Winter)	
Brian	Baker	Chateau Montelena Winery	CC			
Kara	Beer	Battle Creek Area Chamber of Commerce	Winter			
Desiree	Bennyhoff	Edwardsville/Glen Carbon Chamber of Commerce	CC	Katie Haas (1-Midwest)		
Christin	Berry	ASAE: The Center for Association Leadership	CC, BOT		Carla Lochiatto (3-Midwest)	
Rita	Berry	Greater Summerville/Dorchester County Chamber of Commerce	Southeast			
Marvin	Bond	Greater Irving-Las Colinas Chamber of Commerce	Northeast			
Jason	Camis	Gardner Edgerton Chamber of Commerce	West			
Rich	Cantillon	Ponca City Area Chamber of Commerce	BOT			
Erin	Carney	Metrocrest Chamber of Commerce	Winter			
Karri	Clark	Bozeman Area Chamber of Commerce	Winter			
Steve	Clark	Fayetteville Chamber of Commerce	Northeast	Jill Abshier (1-Winter)	Chris Decker (2-Northeast)	
Graham	Cobb	Greater Bentonville Chamber of Commerce	West		Debbie Griffin (2-Midwest)	
Kate	Conroy	New Jersey Business & Industry Association	Northeast		Whitney Lewis (4-Northeast)	
Kim	Dahlsten	Catawba County Chamber of Commerce	Southeast	Connie Saunders (1-Southeast)		
Bryan	Daniels	Blount Partnership	BOT, Southeast	Jessica Belitz (1-Southeast)	Kim Mitchell (2-Southeast)	
Liz	Deville	SWLA Economic Development Alliance	Southeast		Brittany Duplechain (2-Winter); Amanda White (3-Northeast)	
Josh	Driskell	Jenks Chamber of Commerce	Winter			
Cat	Dority	Charleston Area Convention and Visitors Bureau	CC, BOT			
Ryan	Evans	Utah Solar Energy Association	West			
Tony	Felker	Frisco Chamber of Commerce	CC, West	David Cheek (1-Midwest); Alicia Kasper (1-West)	Karen Kim (2-Midwest)	
Bill	Fleming	Pekin Area Chamber of Commerce	Midwest			
Rudy	Flores	Lincoln Square Ravenswood Chamber of Commerce	Winter		Katie Kraus (3-Midwest)	
Henry	Florsheim	Wichita Falls Chamber of Commerce	Southeast	Jinna Barrett (1-Southeast); Jenny Hines (1-Southeast); Christina Bell (1-Southeast)		
Jeff	Griffin	Peoria Area Chamber of Commerce & The CEO Council	Midwest		Kelly Donnelly (4-Midwest)	
Brenda	Gudex	Envision Greater Fond du Lac, Inc.	Winter	Cecilia Harry (1-Northeast)		
Kim	Guida	Rochester Automobile Dealers Association	BOT			
Heidi	Gullickson	Brookings Area United Way	Midwest			
Tracey	Halliday	American Beverage Association	Midwest			
Steve	Halter	Greater Poplar Bluff Area Chamber of Commerce	Winter			
Joe	Henning	Aurora Regional Chamber of Commerce	BOT			
Lisa	Hermes	McKinney Chamber of Commerce	West		Linda Imai-Dixon (2-West); Kathy Blank (2-West)	
Mike	Hofman	Orange City Chamber of Commerce	Winter			
Liz	Horton	Greenville Chamber of Commerce	Southeast	Ebony Austin (1-Southeast)		
Rick	Howe	Jackson Hole Chamber of Commerce	Winter	Elisabeth Rohrbach (1-Winter); Anna Olson (1-Winter); Riley Frances Boone (1-West)		Meri Ann Rush (1-Winter)
Lisa	Hoyt	Petoskey Regional Chamber of Commerce	Midwest	Nikki DeVitt (1-Southeast)		
Pammie	Jimmar	Chamber of Commerce of Huntsville/Madison County	Southeast	Claire Aiello (1-Southeast); Kristy Drake (1-Southeast)	Mary McNairy (2-Southeast)	
Dawn	Johnson	Muskegon Lakeshore Chamber of Commerce	BOT, Midwest	Carla Flanders (1-Winter)		
DJ	Johnson	American Society of Interior Designers	BOT			
Jim	Johnson	Georgetown Chamber of Commerce	West		Allison McKee (3-Southeast)	
Mike	Johnson	National Stone, Sand, and Gravel Association	Winter	Laura O'Neill (1-Northeast)		
Andy	Johnston	Grand Rapids Area Chamber of Commerce	Midwest			
Christine	Kennedy	Lynchburg Regional Business Alliance	CC, Southeast			
Nick	Kieffer	Goshen Chamber of Commerce	CC, Winter			
Michelle	Kiely	Knoxville Chamber of Commerce	Southeast			
Avon	Knowlton	City of DeRidder	Northeast			
Cheryl	Kuhn	Southern Chester County Chamber of Commerce	Northeast			
Brad	Lacy	Conway Area Chamber of Commerce	BOT, West	Leo Cummings (1-West)	Therese Williams (4-West); Adena White (4-West); Laura Davis (3-West)	

2018 Volunteer Recruitment Grid

Jack	Lank	The United Regional Chamber of Commerce	BOT			
Bill	Lee	Gallup-McKinley County Chamber of Commerce	Winter			
Dan	Lemyre	Association Headquarters, Inc.	Northeast			
Jackie	Lovejoy	Dearborn Area Chamber of Commerce	Northeast			
Megan	Lucas	Lynchburg Regional Business Alliance	BOT			
Duffy	MacKay	Council for Responsible Nutrition	Winter		Andrea Wong (2-Northeast)	
Kelle	Marsalis	Dallas Regional Chamber	BOT, CC, West	Meghan Kelley (1-Winter)	Diana Rivas-Smith (4-Winter); Katherine Summerfield (2-Winter)	Adrian Cain (1- West)
Matt	McCormick	Columbia Chamber of Commerce	BOT, CC		Jolyn Sattizahn (2-Winter)	
Tim	McKee	Olathe Chamber of Commerce	BOT, CC		Kelly Peetoom (2-Midwest)	
Pete	McNamara	New Hampshire Automobile Dealers Association	CC, Northeast	Jessica Dade (1-Northeast)		
Robert	Medler	Tucson Metro Chamber	CC, Winter			
Patty	Montgomery	American Society of Civil Engineers	Northeast		Leslie Payne (3-Northeast); Angela Cochran (2-Northeast)	
Crystal	Moore	Association of Chamber of Commerce Executives	CC, BOT		Michelle De Graff (3-Winter)	
Beth	Morrison	Greater Dalton Chamber of Commerce	Southeast		Rob Bradham (3-Southeast)	
Peter	Murphy	Illinois Association of Park Districts	Midwest			
Robert	Newman	Independent Film and Television Alliance	West			
Douglas	OFlaherty	South Carolina Restaurant and Lodging Association	Northeast	Katie Montgomery (1-Northeast)		
Lynn	Olberding	Marshalltown Area Chamber of Commerce	Winter			
Erica	Pangburn	Abilene Chamber of Commerce	Winter		Cheri Drysdale (3-Midwest)	
Stephanie	Parton	Indiana CPA Society	BOT, Winter		Sherrill Rude (2-Winter)	
Jodie	Perry	Richland Area Chamber of Commerce	Midwest			
Heidi	Peterson	Wyoming Taxpayers Association	West			
Thane	Phelan		West			
Jackie	Rakers	Illinois Association of Mutual Insurance Companies	CC			
Jennifer	Reiser	Billings Area Chamber of Commerce	West		Kelly McCandless (2-West)	
Rick	Roden	Greater Jackson County Chamber of Commerce	Southeast			
Teri	Smiley	Walton County Chamber of Commerce	Southeast			
Mike	Smith	Solar Energy Industries Association	Northeast			
Katie	Stice	Greater Coachella Valley Chamber of Commerce	West		Rebecca Rizzo (2-West)	
Carrie	Stuart	Gettysburg Adams Chamber of Commerce	BOT, Northeast			
Steve	Swafford	Leadership Outfitters, LLC	CC			
Gene	Terry	Association Headquarters, Inc.	West			
Bob	Thomas	Michigan Chamber of Commerce	CC	Dan Papineau (1-Midwest); Anita Lindsay (1-Midwest)		
Carlton	Tidwell	Terrell Chamber of Commerce	Southeast	Angie Cooper (1-Southeast)		
Raymond	Towle	U.S. Chamber of Commerce	BOT			
Marnie	Uhl	Prescott Valley Chamber of Commerce	BOT		Gloria Grose (2-Winter)	
Robert	Uhler	Mid-America Lumbermens Association/WEDA	Northeast		Cory Hayes (4-Southeast)	
Ray	Villegas	Seminole County Regional Chamber of Commerce	Southeast			
Allison	Walden	Tulsa Regional Chamber	CC, Southeast		Kuma Roberts (4-West); Kathy Duck (2-Midwest); Vince Trinidad (4-Midwest)	
Chris	Wallace	North Texas Commission	BOT			
Scott	Waller	Mississippi Economic Council	BOT, Southeast	Beth Kitchings (1-Northeast)	Danielle Williams (2-Southeast); Rosie Thomas (2-Southeast); Emily Wooten (4-Southeast); Will Caves (4-Southeast); Jason Word (3-Southeast)	
Lisa	Weitzel	Illinois Association of Chamber of Commerce Executives	Midwest			Kelly Baltes (1-Winter); Katie Haas (1-Midwest); Latonya Brock (1-Midwest); Christina Van Yperen (1-Midwest); Lauren Hollasch (1-Midwest); Wayne Lofton (1-Midwest)
Angie	Whitcomb	Shakopee Chamber of Commerce	CC, Midwest		Elliot Johnson (1-Midwest)	
Morri	Yancy	Lake Gunterville Chamber of Commerce	CC	Jennifer Hulsey (1-Southeast)		
Heidi	Zich	Home Builders Association of the Fox Cities	Midwest			



2018 ATTENDEES

ATTENDEE STATE BREAKDOWN

882 Attendees from 48 states and the District of Columbia

State, Number of Attendees, %

Alabama,	20,	2%	Nebraska,	7,	1%
Alaska,	9,	1%	Nevada,	1,	0%
Arizona,	13,	2%	New Hampshire,	4,	0%
Arkansas,	27,	3%	New Jersey,	6,	1%
California,	27,	3%	New Mexico,	6,	1%
Colorado,	7,	1%	New York,	6,	1%
Delaware,	2,	0%	North Carolina,	35,	4%
District of Columbia,	55,	6%	North Dakota,	1,	0%
Florida,	28,	3%	Ohio,	15,	2%
Georgia,	37,	4%	Oklahoma,	24,	3%
Idaho,	7,	1%	Oregon,	9,	1%
Illinois,	44,	5%	Pennsylvania,	15,	2%
Indiana,	16,	2%	Rhode Island,	2,	0%
Iowa,	19,	2%	South Carolina,	31,	4%
Kansas,	21,	2%	South Dakota,	7,	1%
Kentucky,	17,	2%	Tennessee,	32,	4%
Louisiana,	11,	1%	Texas,	82,	10%
Maine,	1,	0%	Utah,	1,	0%
Maryland,	24,	3%	Vermont,	2,	0%
Massachusetts,	10,	1%	Virginia,	66,	8%
Michigan,	25,	3%	Washington,	8,	1%
Minnesota,	16,	2%	West Virginia,	3,	0%
Mississippi,	25,	3%	Wisconsin,	15,	2%
Missouri,	28,	3%	Wyoming,	12,	1%
Montana,	3,	0%			

States not represented:

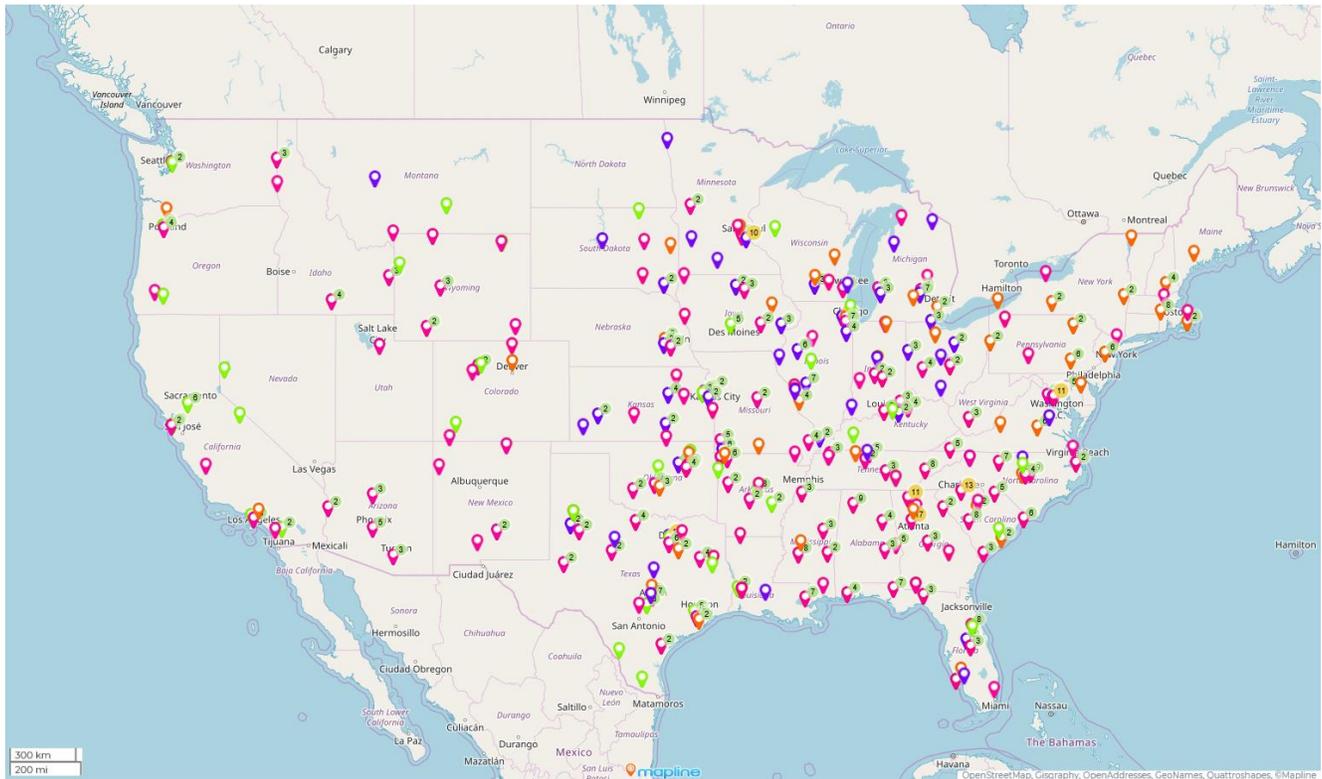
- Hawaii
- Connecticut



2018 ATTENDEES

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

ATTENDEE STATE BREAKDOWN



-  Midwest 2018
-  Northeast 2018
-  Southeast 2018
-  West 2018
-  Winter 2018



WINTER

2019 BOARD OF REGENTS ROSTER

CHAIR

Nick Kieffer, IOM, CP

President and CEO
Goshen Chamber of Commerce
232 South Main Street
Goshen, IN 46526
574-533-2102
nkieffer@goshen.org
Term: 2018-2019

PAST CHAIR

Stephanie M. Parton, IOM, CAE

Vice President, Communications
Indiana CPA Society
900 East 96th Street, Suite 250
Indianapolis, IN 46240
317-726-5026
sparton@incpas.org
Term: 2018-2019

Kara Beer, IOM

President
Battle Creek Area Chamber of Commerce
34 West Jackson Street, Suite 3A
Battle Creek, MI 49017
269-962-4076
kbeer@battlecreek.org
Term: 2016-2020

Karri Clark, IOM

Director of Sales and Membership Operations
Bozeman Area Chamber of Commerce
2000 Commerce Way
Bozeman, MT 59715
406-922-0448
kclark@bozemanchamber.com
Term: 2016-2020

VICE CHAIR

Robert Medler, IOM

Vice President, Government Affairs
Tucson Metro Chamber
PO Box 991
Tucson, AZ 85701
520-792-2250
rmedler@tucsonchamber.org
Term: 2018-2019

Steven Baas, IOM

Senior Vice President, Government Affairs and
Public Policy
Metropolitan Milwaukee Association of
Commerce
756 North Milwaukee Street, Suite 400
Milwaukee, WI 53202
414-287-4138
sbaas@mmac.org
Term: 2015-2019

Erin Carney, IOM

President
Metrocrest Chamber of Commerce
2550 Midway Road #240
Carrollton, TX 75006
469-587-0420
erin@metrocrestchamber.com
Term: 2017-2019

Josh Driskell, IOM

President and CEO
Jenks Chamber of Commerce
115 South 1st Street
Jenks, OK 74037
918-299-5005
josh.driskell@jenkschamber.com
Term: 2018-2020



WINTER

2019 BOARD OF REGENTS ROSTER

Rodolfo Flores, IOM

Executive Director
Lincoln Square Ravenswood Chamber of
Commerce
2611 West Lawrence Avenue
Chicago, IL 60625
773-728-3890
rudu@lincolnsquare.org
Term: 2017-2019

Brenda Gudex, IOM

Director of Agricultural Programs and
Leadership Fond du Lac
Envision Greater Fond du Lac, Inc.
23 South Main Street, Suite 101
Fond du Lac, WI 54935
920-921-9500
bgudex@envisiongreaterfdl.com
Term: 2017-2019

Steve Halter, IOM, EDFP, PCED

President
Greater Poplar Bluff Area Chamber of
Commerce
1111 West Pine Street
Poplar Bluff, MO 63901
573-785-7761
shalter@poplarbluffchamber.org
Term: 2015-2019

Mike Hofman, IOM

Executive Director
Orange City Chamber of Commerce
509 8th Street SE
Orange City, IA 51041
712-707-4510
occhmbr@gmail.com
Term: 2016-2020

Rick Howe, IOM

Vice President
Jackson Hole Chamber of Commerce
PO Box 550
Jackson, WY 83001
307-201-2294
rick@jacksonholechamber.com
Term: 2014-2020

Michael W. Johnson, IOM

President and CEO
National Stone, Sand, and Gravel Association
1605 King Street
Alexandria, VA 22314
703-525-8788
mjohnson@nssga.org
Term: 2018-2020

William Lee, IOM

Chief Executive Officer
Gallup-McKinley County Chamber of
Commerce
106 West Highway 66
Gallup, NM 87301
505-722-2228
bill@thegallupchamber.com
Term: 2014-2020

Douglas MacKay, IOM, N.D.

Senior Vice President, Scientific and Regulatory
Affairs
Council for Responsible Nutrition
1828 L Street, NW, Suite 510
Washington, DC 20036
202-204-7664
dmackay@crnusa.org
Term: 2016-2020



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

WINTER

2019 BOARD OF REGENTS ROSTER

Lynn Olberding, IOM

Executive Director
Marshalltown Area Chamber of Commerce
PO Box 1000
Marshalltown, IA 50158
641-753-6645
lolberding@marshalltown.org
Term: 2017-2019

Erica Pangburn, IOM

Director of Community Engagement
Abilene Chamber of Commerce
PO Box 2281
Abilene, TX 79604
325-669-5536
erica@abilenechamber.com
Term: 2018-2020



AGENDA

OCTOBER 5, 2018

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

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

- I. **Welcome and Introductions** Nick Kieffer, IOM, CP
- II. **Approval of Minutes** Nick Kieffer, IOM, CP
- III. **2019 Winter Institute** Board Members/Institute Staff
- A. Review of Strategic Goals
- Recruit a stretch goal of 250 overall attendees, including 65 first-years.
 - Raise \$10,000 through the silent auction.
 - Recruit one first-year attendee per each member of the Board of Regents.
- B. Class Advisor/Regent Partner Discussion
- C. Discussion of the Week/Regent Responsibilities
- Program Location
- IV. **Institute Staff Update** Institute Staff
- A. Program Updates and Looking Ahead
- V. **Other Business/Adjournment** Nick Kieffer, IOM, CP

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



WINTER

MINUTES MAY 23, 2018 12:00 PM EDT CONFERENCE CALL

In attendance: Nick Kieffer, IOM, CP; Robert Medler, IOM; Stephanie M. Parton, IOM, CAE; Steven Baas, IOM; Kara Beer, IOM; Erin Carney, IOM; Josh Driskell, IOM; Brenda Gudex, IOM; Steve Halter, IOM, EDFP, PCED; Mike Hofman, IOM; Duffy MacKay, IOM, N.D.; Lynn Olberding, IOM; Erica Pangburn, IOM; Karyn K. MacRae, IOM, CAE, CMP; Caitlin Gayles; Andrew Weller, IOM; Alyssa Koernick

I. Welcome and Introductions

Nick Kieffer, IOM, CP welcomed everyone to the call and roll was taken.

II. Approval of Minutes

Minutes from the March 6, 2018 meeting were approved with no changes.

III. Staff Update

- Registration/Scholarships
 - Staff shared that the Winter registration and scholarship application will launch in late August through a new registration system.
- 2019 Tuition
 - The group was notified that starting in 2019, tuition will increase by \$100, putting early enrollment pricing at \$1,395 and \$1,845 for members and non-members, respectively.
- Dress Code
 - Regents were made aware that Institute's recommended dress code can now be found online under [policies and procedures](#).
- On-Site Welcome Bag
 - It was reported that attendees will receive a welcome bag on-site, which will include snacks and a welcome letter from the Board of Regents chair, as well as tips from the regents.

IV. Review of Strategic Goals

The strategic goals were reviewed amongst the group.

V. 2019 Winter Institute

Regents shared recruitment and marketing efforts, which included distributing materials at various state conferences. They were reminded to continue with recruitment efforts all year round, even though registration will not open until August.



MINUTES
MAY 23, 2018
12:00 PM EDT
CONFERENCE CALL

Staff shared that next year's graduation and Big Bash event will be held at the host Marriott Hotel, and details will be planned this fall. An update was provided on the construction taking place at the Marriott, which is slated to be completed in November of 2019. Lastly, staff shared that the classroom space is TBD and will be confirmed in the fall.

Additional regent responsibilities were discussed. Advisor recommendations and feedback were provided and the 5k scholarship run was confirmed. Fundraising and the auction were briefly discussed, and the committee confirmed they would create a promotion strategy to highlight the best selling items.

The rest of the regent updates will take place at a later date as it gets closer to January.

VI. Other Business/Adjournment

There being no other business the call was adjourned.

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



WINTER

2019 SCHEDULE OF ACTIVITIES

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

Sunday, January 6

11:30 a.m.–1:30 p.m.
2:30 p.m.–4:00 p.m.
3:30 p.m.–4:00 p.m.
4:00 p.m.–4:45 p.m.
5:00 p.m.–5:30 p.m.

Board of Regents and Class Advisor Briefing: Tucson University Park Hotel
Registration: Tucson University Park Hotel, Lobby Level
Graduation Rehearsal (4th years only)
Homeroom: Individual Classrooms
Institute Kickoff

Monday, January 7

7:00 a.m.–8:00 a.m.
8:00 a.m.–11:30 a.m.
11:30 a.m.–12:30 p.m.
12:30 p.m.–4:00 p.m.
1:30 p.m.–2:00 p.m.
4:15 p.m.–6:15 p.m.
Evening

Registration: Institute Office
Core Classes: Individual Classrooms (*Break: 9:30 –10:00 a.m.*)
Lunch
Core Classes: Individual Classrooms (*Break: 2:00 –2:30 p.m.*)
Class Advisor Meeting: Faculty/Regent Lounge
Elective Classes: Individual Classrooms
Class Dinner Option

Tuesday, January 8

8:00 a.m.–10:00 a.m.
10:30 a.m.–12:30 p.m.
11:00 a.m.–11:30 a.m.
12:30 p.m.–1:00 p.m.
1:00 p.m.–4:30 p.m.
2:00 p.m.–2:30 p.m.
5:00 p.m.–6:30 p.m.
Evening

Elective Classes: Individual Classrooms (*Break: 10:00 –10:30 a.m.*)
Elective Classes: Individual Classrooms
Board of Regents Meeting: Faculty/Regent Lounge
Lunch
Core Classes: Individual Classrooms (*Break: 2:30 –3:00 p.m.*)
Class Advisor Meeting: Faculty/Regent Lounge
Scholarship Run/Walk: Tucson University Park Hotel
Class Dinner Option

Wednesday, January 9

8:00 a.m.–11:30 a.m.
9:00 a.m.–9:30 a.m.
11:30 a.m.–12:30 p.m.
12:30 p.m.–4:00 p.m.
6:30 p.m.–10:30 p.m.

Core Classes: Individual Classrooms (*Break: 9:30 –10:00 a.m.*)
Class Advisor Meeting: Faculty/Regent Lounge
Lunch
Core Classes: Individual Classrooms (*Break: 2:00 –2:30 p.m.*)
Graduation Ceremony and Big Bash: Tucson University Park Hotel

Thursday, January 10

8:00 a.m.–11:30 a.m.
9:00 a.m.–9:30 a.m.
10:00 a.m.–10:30 a.m.
11:30 a.m.

Core Classes: Individual Classrooms, (*Break: 9:30 –10:00 a.m.*)
Class Advisor Meeting: Faculty/Regent Lounge
Board of Regents Meeting: Faculty/Regent Lounge
2019 Winter Institute Concludes



WINTER

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

2019 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

Class Advisors

Robert Medler
Rudy Flores

Silent Auction/Fundraising

Mike Hofman
Rick Howe
Josh Driskell

Industry Consultations

Kara Beer
Karri Clark
Steve Baas

Scholarships

Brenda Gudex
Bill Lee
Erin Carney
Robert Medler

Opening Welcome

Kara Beer
Karri Clark
Erin Carney
Bill Lee
Robert Medler

Big Bash

Robert Medler

Association Event

Duffy MacKay
Mike Johnson

5k

Steve Halter
Rick Howe

Pre- or Post- Networking/Social Event

Rudy Flores

2. _____

3. _____

Volunteer/Faculty/Staff Dinner

1. _____

State Photos (Optional)

Lynn Olberding

2. _____

3. _____

Social Media Strategy (Optional)

1. _____

2. _____



WINTER

2019 CLASS ADVISOR ROSTER

Maile Ilac Boeder, IOM

Executive Director
The Leadership Center/Nebraska Vocational
Agricultural Foundation
1609 East Highway 34
Aurora, NE 68818
402-694-3934
executivedirector@tlcaurora.org
Section: 3-2

Renna Hadsall, IOM

Events Manager
Pekin Area Chamber of Commerce
402 Court Street
Pekin, IL 61554
309-346-2106
renna@pekinchamber.com
Section: 2-1

Sue Reed, IOM

President and CEO
Crossroads Regional Chamber of Commerce
9101 Taft Street
Merrillville, IN 46410
219-769-8180
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Section: 1-1

Kyle Tarbet, IOM

Programs and Marketing Coordinator
Twin Falls Area Chamber of Commerce
2015 Neilsen Point Place, Suite 100
Twin Falls, ID 83301
208-733-3974
kyle@twinfallschamber.com
Section: 2-2

Brenda Frederick, IOM

Executive Director
Orthopaedic Research Society
9400 West Higgins Road, Suite 225
Rosemont, IL 60018
847-430-5020
frederick@ors.org
Section: 4-2

Jo Mixon, IOM

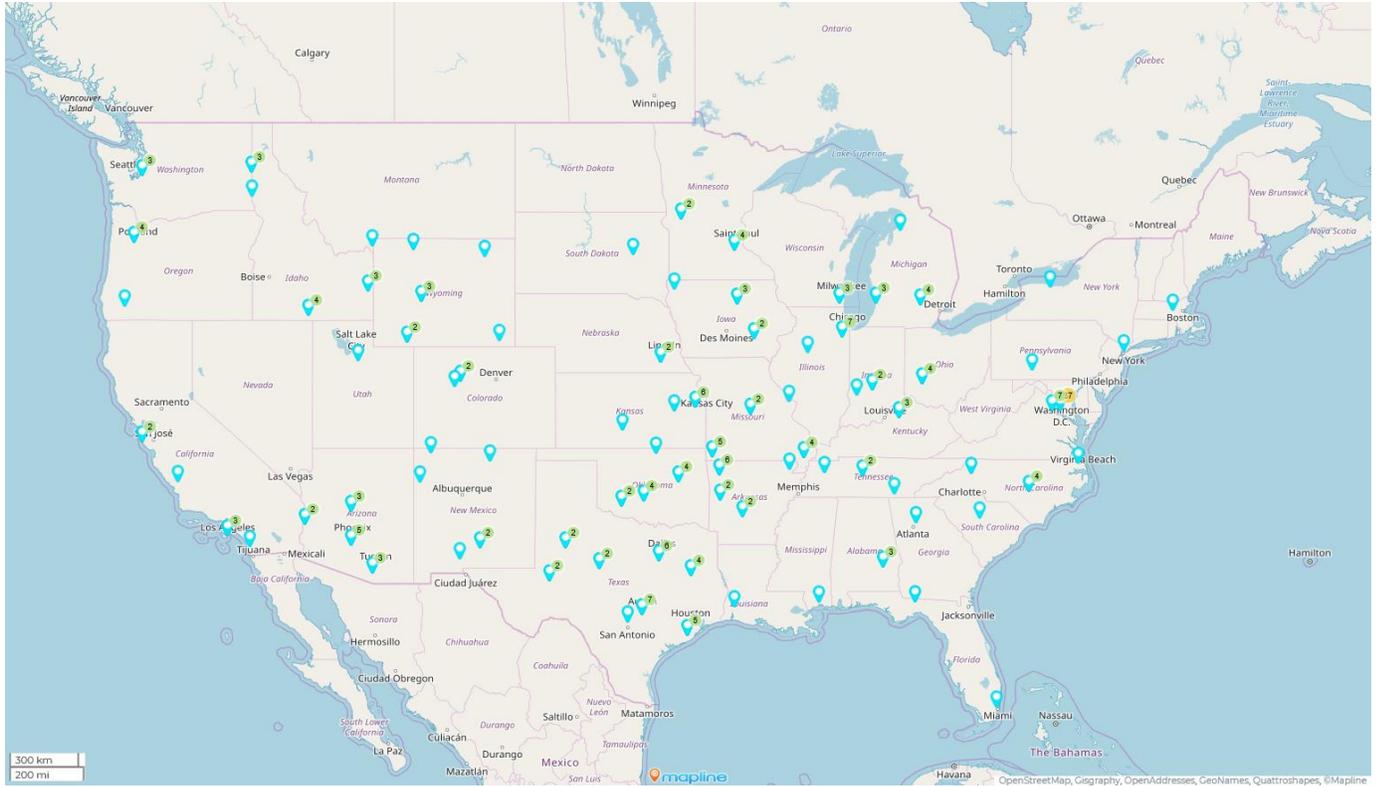
President and CEO
Angel Fire Chamber of Commerce
PO Box 547
Angel Fire, NM 87710
505-377-6353
manager@angelfirechamber.org
Section: 1-2

Meredith Rivers, IOM

Member and Investor Relations Coordinator
Chattanooga Area Chamber of Commerce
811 Broad Street, Suite 100
Chattanooga, TN 37402
423-763-4342
mrivers@chattanoogaachamber.com
Section: 3-1

Robert Wiggans, IOM, CAE

Senior Director of Membership
Wine & Spirits Wholesalers of America
805 15th Street, NW, Suite 430
Washington, DC 20005
202-243-7502
bob.wiggans@swa.org
Section: 4-1



OpenStreetMap, Geography, OpenAddresses, GeoNames, Quattroshaper, ©Mapline



MIDWEST

2018 BOARD OF REGENTS ROSTER

CHAIR

Dawn Johnson, IOM

Vice President
Muskegon Lakeshore Chamber of Commerce
380 West Western Avenue, Suite 202
Muskegon, MI 49440
231-722-3751
johnsond@muskegon.org
Term: 2017-2018

VICE CHAIR

Angela Whitcomb, IOM

President
Shakopee Chamber of Commerce
1801 East County Road 101
Shakopee, MN 55379
952-445-1660
awhitcomb@shakopee.org
Term: 2017-2018

PAST CHAIR

Jodie A. Perry, IOM, CCE, CCEO-AP

President
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55 North Mulberry Street
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419-522-3211
JPerry@RichlandAreaChamber.com
Term: 2017-2018

Jenna Armstrong, IOM

Chief Executive Officer
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Term: 2016-2018

William Fleming, IOM, ACE

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Term: 2016-2018

Jeffrey Griffin, IOM

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Term: 2015-2019

Heidi Gullickson, IOM

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Heidi@brookingsunitedway.org
Term: 2015-2019

Tracey Halliday, IOM

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Term: 2015-2019



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2018 BOARD OF REGENTS ROSTER

Lisa Hoyt, IOM

Membership Director
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401 East Mitchell Street
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231-347-4150
lisa@petoskeychamber.com
Term: 2014-2018

Andrew Johnston, IOM

Vice President, Government and Corporate
Affairs
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Term: 2017-2019

Peter Murphy, IOM, CAE, J.D.

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pmurphy@ilparks.org
Term: 2017-2019

Lisa Weitzel, IOM, CAE

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Executives
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Heidi Zich, IOM

Executive Vice President
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heidi.zich@hbafocxcities.com
Term: 2015-2019



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

AGENDA

OCTOBER 5, 2018

10:15 A.M. – 12:00 P.M. EDT

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

- | | | |
|------|--|-------------------------------|
| I. | Welcome and Introductions | Dawn Johnson, IOM |
| II. | Approval of Minutes | Dawn Johnson, IOM |
| III. | Nominating Committee Report | Angela Whitcomb, IOM |
| IV. | Analysis of 2018 Midwest Institute | Board Members/Institute Staff |
| | A. Final Enrollment Report | |
| | B. Survey Results and Discussion of Institute Week | |
| V. | 2019 Midwest Institute | Angela Whitcomb, IOM |
| | A. Create 2-3 Strategic Goals | |
| | B. Discussion of Week/Assign Regent Responsibilities | |
| VI. | Institute Staff Update | Institute Staff |
| | A. Program Updates and Looking Ahead | |
| VII. | Other Business/Adjournment | Dawn Johnson, IOM |

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



MINUTES

JUNE 3, 2018

11:30 AM CDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

In attendance: Dawn Johnson, IOM; Jodie A. Perry, IOM, CCEO-AP; William Fleming, IOM; Jeffrey Griffin, IOM; Heidi Gullickson, IOM; Tracey Halliday, IOM; Peter Murphy, IOM, CAE, J.D., Lisa Weitzel, IOM, CAE; Heidi Zich, IOM; Desiree Bennyhoff, IOM, ACE; Corey Hutcherson, IOM; Jennifer Irwin, IOM; Timothy M. McKee, IOM; Megan Schlimm, IOM; Karyn K. MacRae, IOM, CAE, CMP; Caitlin C. Gayles

I. Welcome and Introductions

Dawn Johnson, IOM welcomed everyone to the meeting and introductions were made.

II. Staff Updates and Week Overview

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.

III. Photos and Joint Lunch

Group photos were taken and attendees caught up over lunch.

IV. Class Advisor Responsibilities

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. Other Business and Class Advisor Adjournment

Additional Class Advisor business was discussed and then advisors were dismissed.

VI. Board of Regents Business

- Approval of minutes
 - The minutes from the May 9, 2018 conference call were approved with no changes.
- On-site regent responsibilities
 - Regent roles and expectations during the Institute week were explained. This included, but was not limited to: information on when to arrive at Grainger Hall every day; how they should network with attendees during meals and social functions; after-hours interaction with attendees; what to do while attendees are in class, etc.
- Visiting Homeroom
 - Regents discussed the possibility of visiting each Homeroom.



MINUTES

JUNE 3, 2018

11:30 AM CDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

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

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



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

2019 SCHEDULE OF ACTIVITIES

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

Sunday, June 9

11:30 a.m.–1:30 p.m.
2:30 p.m.–4:00 p.m.
3:30 p.m.–4:00 p.m.
4:00 p.m.–4:45 p.m.
5:00 p.m.–5:30 p.m.

Board of Regents & Class Advisor Briefing: Fluno Center
Registration: Grainger Hall Atrium
Graduation Rehearsal (*4th year participants*): Grainger Hall
Homeroom: Individual Classrooms, Grainger Hall
Institute Kickoff: Morgridge Auditorium, Grainger Hall 1100

Monday, June 10

7:00 a.m.–8:00 a.m.
8:00 a.m.–11:30 a.m.
11:30 a.m.–12:30 p.m.
12:30 p.m.–4:00 p.m.
1:30 p.m.–2:00 p.m.
4:15 p.m.–6:15 p.m.
Evening

Registration: Institute Office, Grainger Hall, Room 1080
Core Classes: Individual Classrooms, Grainger Hall (*Break: 9:30–10:00 a.m.*)
Lunch: Gordon Avenue Market
Core Classes: Individual Classrooms, Grainger Hall (*Break: 2:00–2:30 p.m.*)
Class Advisor Meeting: Grainger Hall
Elective Classes: Individual Classrooms, Grainger Hall
Class Dinner Option

Tuesday, June 11

8:00 a.m.–10:00 a.m.
10:30 a.m.–12:30 p.m.
11:00 a.m.–11:30 a.m.
12:30 p.m.–1:00 p.m.
1:00 p.m.–4:30 p.m.
2:00 p.m.–2:30 p.m.
Evening

Elective Classes: Individual Classrooms, Grainger Hall (*Break: 10:00–10:30 a.m.*)
Elective Classes: Individual Classrooms, Grainger Hall
Board of Regents Meeting: Grainger Hall
Box Lunch: Box lunches available in Grainger Hall Atrium
Core Classes: Individual Classrooms, Grainger Hall (*Break: 2:30–3:00 p.m.*)
Class Advisor Meeting: Grainger Hall
Class Dinner Option

Wednesday, June 12

8:00 a.m.–11:30 a.m.
9:00 a.m.–9:30 a.m.
11:30 a.m.–12:30 p.m.
12:30 p.m.–4:00 p.m.
6:30 p.m.–9:30 p.m.

Core Classes: Individual Classrooms, Grainger Hall (*Break: 9:30–10:00 a.m.*)
Class Advisor Meeting: Grainger Hall
Lunch: Gordon Avenue Market
Core Classes: Individual Classrooms, Grainger Hall (*Break: 2:00–2:30 p.m.*)
Graduation Ceremony Celebration: TBD

Thursday, June 13

8:00 a.m.–11:30 a.m.
9:00 a.m.–9:30 a.m.
10:00 a.m.–10:30 a.m.
11:30 a.m.

Core Classes: Individual Classrooms, Grainger Hall (*Break: 9:30–10:00 a.m.*)
Class Advisor Meeting: Grainger Hall
Board of Regents Meeting: Grainger Hall
2019 Midwest Institute Concludes



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2019 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

Class Advisors

Jeff Griffin

Silent Auction/Fundraising

1. _____

2. _____

3. _____

4. _____

Industry Consultations

1. _____

2. _____

Scholarships

1. _____

2. _____

3. _____

4. _____

Opening Welcome

1. _____

2. _____

3. _____

Graduation Ceremony and Celebration

1. _____

2. _____

3. _____

Volunteer/Faculty/Staff Dinner

1. _____

State Photos (Optional)

1. _____

2. _____

Social Media Strategy (Optional)

1. _____

2. _____

Scavenger Hunt (Optional)

1. _____

2. _____



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GEOGRAPHIC BREAKDOWN

2018 Midwest Institute

147 Attendees from 29 states and The District of Columbia

State, Number of Attendees, %

Alaska, 1,	0.00676	0.68%	Missouri, 6,	0.04054	1.36%
Arkansas, 3,	0.02027	0.68%	Montana, 1,	0.00676	2.04%
California, 1,	0.00676	1.36%	Nebraska, 2,	0.01351	6.12%
Delaware, 1,	0.00676	0.68%	New Jersey, 1,	0.00676	2.04%
District of Columbia, 13,	0.08784	8.78%	North Carolina, 3,	0.02027	2.04%
Florida, 4,	0.02703	1.36%	North Dakota, 1,	0.00676	0.68%
Illinois, 37,	0.25	19.73%	Ohio, 9,	0.06081	2.72%
Indiana, 6,	0.04054	4.08%	Oklahoma, 3,	0.02027	1.36%
Iowa, 7,	0.0473	8.84%	Pennsylvania, 1,	0.00676	0.68%
Kansas, 13,	0.08784	7.48%	South Carolina, 1,	0.00676	3.40%
Kentucky, 3,	0.02027	1.36%	South Dakota, 4,	0.02703	5.44%
Louisiana, 1,	0.00676	1.36%	Tennessee, 1,	0.00676	5.44%
Maryland, 4,	0.02703	7.48%	Texas, 10,	0.06757	6.76%
Michigan, 16,	0.10811	5.44%	Virginia, 7,	0.0473	4.73%
Minnesota, 10,	0.06757	6.12%	Wisconsin, 11,	0.07432	7.43%

Top Increases Since 2017

Texas +9

Illinois +8

Most attendees in 2017, Illinois with 29

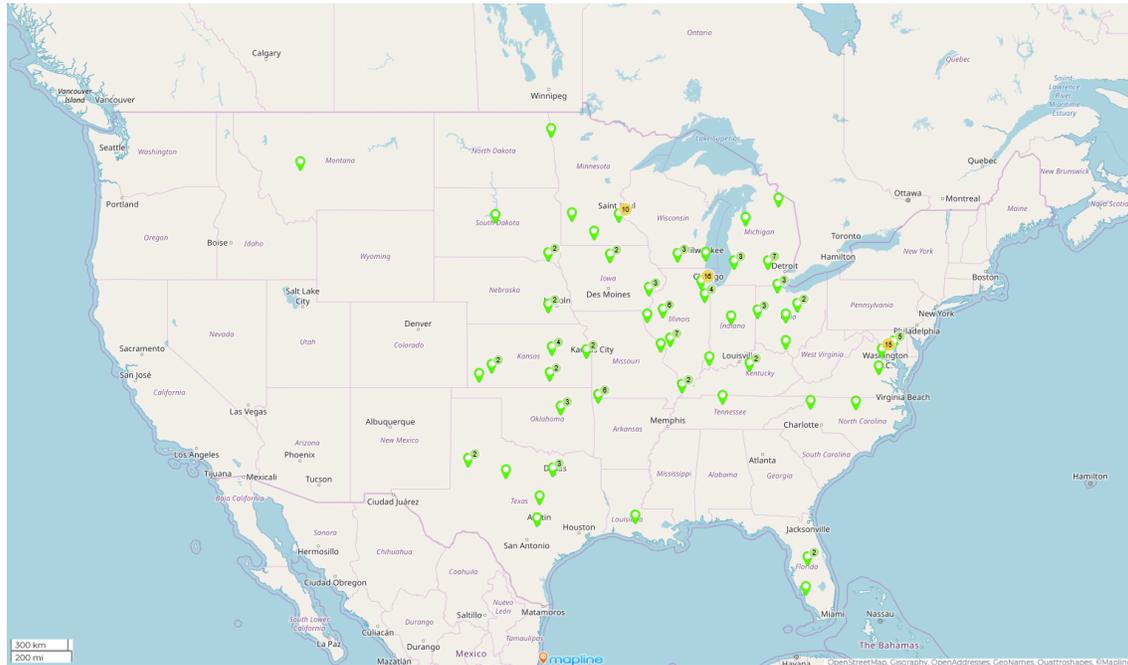
Most attendees in 2018, Illinois with 37

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

GEOGRAPHIC BREAKDOWN

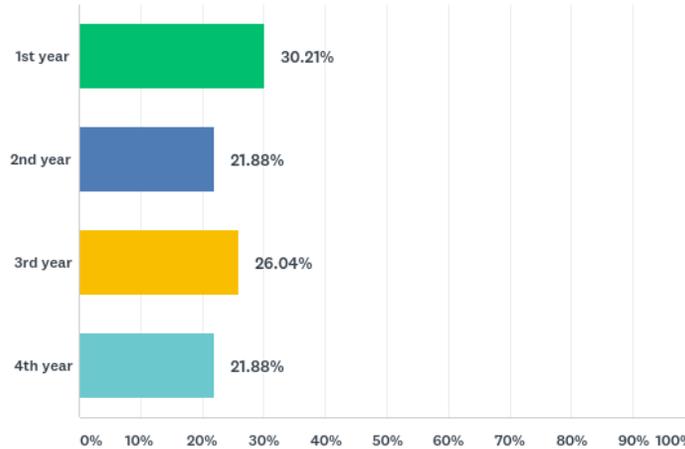




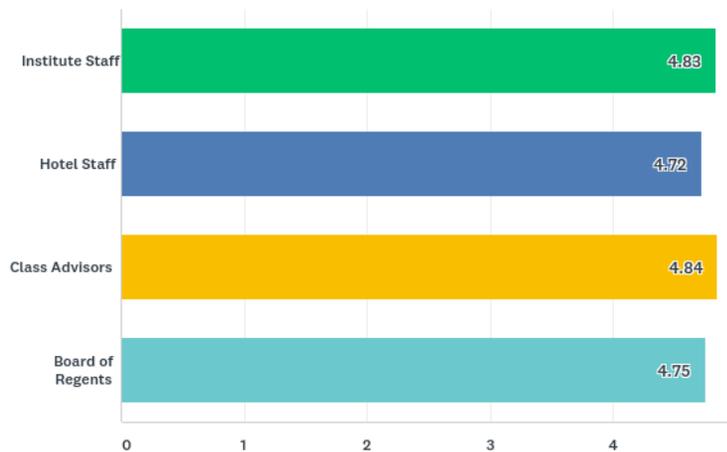
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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q1 Your class level:



Q2 Customer Service (with 1 being poor and 5 being excellent):



Additional comments about customer service*:

- We had an amazing year with an incredible advisor. We'd love for him to be our advisor again!
- Institute staff are amazing and are ever so helpful. I was unsure of the role of [our advisor] in our class. She didn't really contribute and [our advisor] didn't seem to be informed on the ins and outs for our class.
- Very accommodating and friendly.
- Everyone is always willing to assist with any questions or needs.
- Outstanding!

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



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Institute for Organization Management

ATTENDEE SURVEY RESULTS AND FEEDBACK

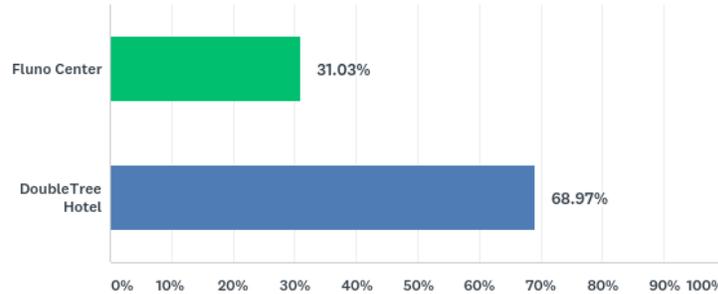
- It was clear to me that each person was committed to making sure this experience was the best that it could be. Kind, helpful and friendly faces were everywhere I turned. Thank you!
- Everyone was very insightful.
- I don't fully understand what the Board of Regent's role is, but ours was very nice.
- Our class advisor was amazing!
- Overall, our class advisors were great, along with [regent partner]! Thank you for your guidance and support.
- [Our advisor] was amazing. Could not have asked for a better advisor - she was insightful, spirited, and very organized.
- Excellent!
- I was very pleased with customer service from all!
- Class advisor [name removed] was outstanding when it came to customer service. As someone who is "fast tracking" he made me feel welcomed in Madison and in class. My experience would not have been as positive without him.
- No one is a stranger after the first hour. Board of Regents did a great job of being involved in breaks, lunch etc.
- I was very impressed with the level of customer service at the hotel and from the chamber program staff and Board.
- Everyone was very helpful and extremely nice.
- The Institute staff were very helpful, friendly, and made me so comfortable. This is my first year, and I have to say my first impression is an exceptional one. The staff at the Fluno Center were fantastic, and the location is very convenient. Our class advisor was [name removed], and she was wonderful. I spoke with several Regents, and they were exceptionally supportive and friendly. Only thing I can add is please add a bowl of ice for those who prefer ice in their drinks, water, pop, etc. I saw some digging ice out of the bowl housing soda. That is kind of nasty.
- I stayed at the Fluno and their service (my housekeeping - Justin) was BEYOND great! He knew I wasn't feeling well and left me a note along with some tea to let housekeeping know if I needed anything.
- I had very little interaction (outside of the classes) with any institute staff and/or the advisor(s).
- Customer service was good in general everywhere we went, but it is interesting how many restaurants don't know we are in town. I would think we are a large group.
- My class advisor [name removed], and she was outstanding. My regent partner only made one appearance, during homeroom.
- Would have liked to see the whole graduation group be at their own assigned tables sitting together.
- [Name removed] was amazing class advisor.
- Awesome staff from the moment we arrived until the end.
- As usual, everyone was great, information free flowing, and an awesome all around event!

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



ATTENDEE SURVEY RESULTS AND FEEDBACK

Q4 Which hotel did you stay at?



Q5 If you stayed at the Fluno Center, how would you rate your accommodations?



Additional comments about Fluno Center accommodations*:

- Everything was outstanding and would be a 5 except the bed was incredibly uncomfortable.
- Great breakfast and friendly staff.
- Great location to training, Walgreens, grocery store, restaurants.
- Last year, they didn't offer breakfast. This year, they did. But when I registered and when I checked in, the Fluno staff didn't tell me. So I brought up breakfast food. It would have been nice to know that they provided breakfast now.
- Wish it had a pool.
- To have breakfast included was a welcome advantage.
- I have always had a wonderful experience but a shuttle to the airport would put them over the top.
- Fantastic that breakfast was included in the room rate. Outstanding meal and service each day.
- I liked the Fluno center a lot! It was clean and close by. Would love to stay there again.
- They offer a free breakfast, which is an added perk from last year!

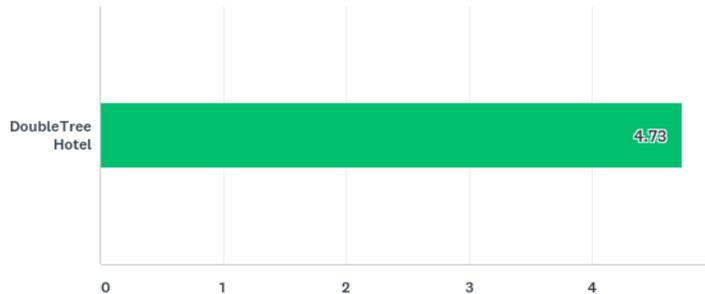
*ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.



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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q7 If you stayed at the DoubleTree Hotel, how would you rate your accommodations?



Additional comments about DoubleTree Hotel accommodations*:

- Complimentary continental breakfast would be nice.
- The AC Hotel is a very good option, but a little beyond comfortable walking distance.
- The past two years we have been granted a late check out, this time (our third year), they said no because they had another conference coming in - that made it difficult to have all of our things packed up and ready out of the room before class since they wouldn't let us request the late check out until the morning of - so essentially they informed us the morning of. Would have liked to know in advance if they were not going to be able to do it but when we asked them about a late check out and they said to ask Thursday morning and then just told "no".
- Staff was awesome and very attentive.
- They are always very accommodating.
- For the price of the hotel, a complimentary breakfast would have been a nice feature. I know that the Fluno offers this amenity.
- Nice hotel with great accommodations, reliable shuttle service and good walking distance to campus.
- Absolutely loved DoubleTree. They were great to work with this year. From giving us cookies anytime we asked, to arranging shuttles for our dinners and airport trip. They rocked!
- Pricey...had a little trouble with my room...all was eventually resolved.
- Stayed there 2 years in row and plan to be back next year.
- Very nice room and close to all events.
- Comfortable, clean and a great fitness center...oh, and did I mention the cookies? Excellent stay!
- Very pleasant and helpful. Really appreciate the shuttle.
- Room was fine, staff was questionable and unprofessional.
- Very nice. Only issue - pricey for food (\$15 for continental breakfast with tip), on top of the room charge.
- Above and beyond great customer service from cleaning to front desk to van driver...awesome!
- In years past it was better.
- Great staff and service.

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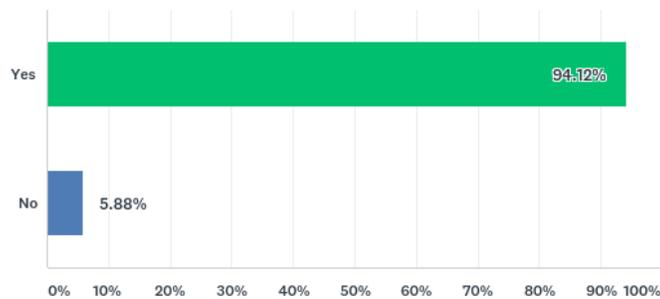


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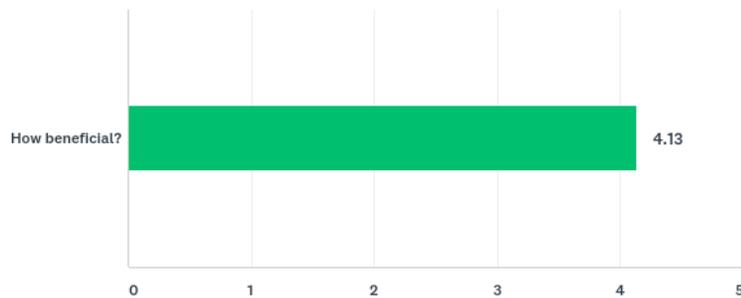
ATTENDEE SURVEY RESULTS AND FEEDBACK

- They went above and beyond to help me with whatever I needed! Great hotel!
- Everything was very nice. Staff was very courteous.

Q9 Did you download the 2018 Midwest Institute App?



Q10 If you downloaded the app, how beneficial was it?



Additional comments about the 2018 Midwest Institute App*:

- Wish the pictures were bigger on the profiles.
- This was a very functional tool!
- For some reason, it made me login every time I visited it. Ended up just using the schedule card that was given to me upon check-in.
- Would be good to have classes automatically added to calendar.
- Would it be possible to have your transcripts on the App? Would be super helpful when registering for the next year's classes.
- Very quick and easy to review agenda and class evals.
- It was easy to follow and use it.
- Instructor info not linked to class. That has been helpful in past years. Unless I misunderstood the app, I always needed to click through Midwest (vs. having it saved as a preference).

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



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ATTENDEE SURVEY RESULTS AND FEEDBACK

- I used the app for creating my agenda, submitting evaluations and messaging classmates. It was helpful. If there is a way to set up push notifications, that might have been helpful.
- Having the app was great. I checked all my classes before heading to Wisconsin so I had my own agenda in my app. I also loved that we could do the class surveys on it. It made it so easy to do. I know I didn't have any issues figuring out which surveys I needed to do. Loved it!
- It seemed to not capture all of my electives, might be my error.
- I hardly used the app. I would prefer to do the class evaluations on paper after the class has concluded.
- It was a little wonky. I wish it was easier to tell which review surveys I completed and which I missed. Also, when looking up the calendar, it wouldn't always save the ones I marked for my personal calendar properly. And if I looked up people, it always went back to the full list after clicking on a name. Would be better to go back to filtered list so I didn't have to keep repeating the search.
- It was nice to have access to details about courses and schedules that I did not commit to memory.
- It is beneficial if everyone is using the app. I tried to connect with others in my state and nobody else was using it.
- Glitchy.
- Have the speaker evaluations on a separate tab or easier to find - or move to top of page ... didn't scroll down page far enough to see them.
- Might be cool to have digital profiles of the participants should they want to have it so people can easily connect on LinkedIn, etc.
- It was handy to have it all right there at your fingertips!
- Worked well, but not all information from the speakers gets downloaded. Would like to get copies of the powerpoints and other information.
- As a fourth year, I didn't use it as much as my previous years. It was vital for me my first couple years but used it less and less as I knew what to expect.
- For some reason I had to login with my email every time I tried to use it. That prevented me from using it often.
- Only used for course evaluations. Having to upload your personal class schedule was not very user-friendly.
- Never figured out how to do evaluations. Leave them in paper format at the end of the class next year.
- I couldn't find it when I searched the Apple store. I wish there was someone who offered to help (I'm one of the young institute attendees so I hope I wasn't the only one with this problem). I would've loved to fill out surveys but that wasn't an option without the app.
- It was nice to save paper and do the evaluations on the app.
- Didn't really use it.
- Sorry, not very tech savvy and was so busy that I did not follow the link and load when I originally received it. I tried to download it on site and was able to get into it on my computer then could not find the presenter evaluations.
- Great resource for me during my first year!

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



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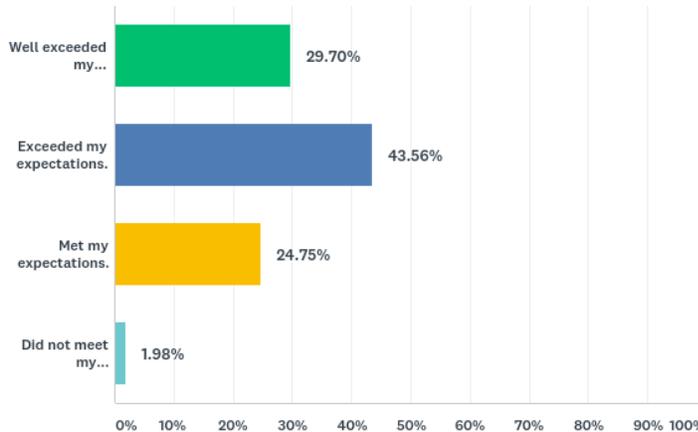
ATTENDEE SURVEY RESULTS AND FEEDBACK

- Didn't like the reviews on the app... would rather have them handed out in class.
- I thought the app was very useful and a great tool.
- It's challenging to navigate a bit - took a while to figure it out.
- I would prefer all multiple choice on the app, or provide paper documents as it's too cumbersome to type comments on the phone.
- Didn't see evaluations for mandatory classes.
- I had trouble with the app at first, it populated all of last year's classes. Once I deleted it and re-downloaded, twice, it worked fine.
- It was easy and very user friendly.
- A little annoying to have to log into the Midwest session every time I opened the app.
- It was probably beneficial to those who are into apps. I only used the app to rate the speakers.
- Worked great.
- I only downloaded it to complete the surveys. I do not typically find it especially useful, it is confusing to navigate and did not even show my electives in my schedule.
- Great tool. Please keep for next year.
- It was an easy to use platform for the surveys and class schedule. I would like to see additional ideas for restaurants or things to do in the area.
- I would have just liked a quick rundown on how to use it from staff. The agenda/schedule was easy, but I saw later there were ways to message with your advisor, classmates, etc. that I was unaware of until too late.
- I think it was smart to have the review submissions via the app to encourage us to use it. Although I do believe there was concern that the reviews were no longer anonymous.
- I wish it came pre-loaded with my schedule. It's cumbersome to have to go select every course I'm in and add it to my personal agenda. After you add one course, it sends you back to the main schedule and you have to scroll through the entire schedule again. Even having a second year schedule and then electives at the end would be better.

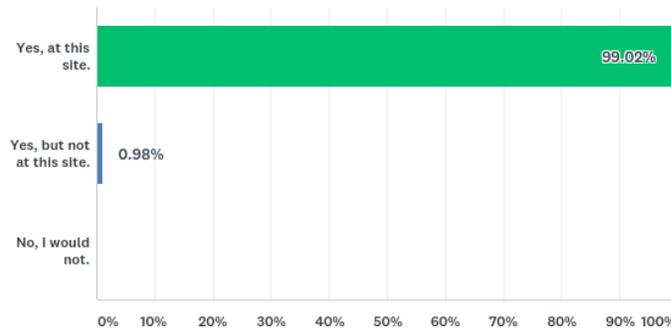


ATTENDEE SURVEY RESULTS AND FEEDBACK

Q12 Overall, to what extent did Institute meet your expectations?



Q13 Would you recommend Institute to other nonprofit professionals?



Additional general comments or suggestions about Institute*:

- I found that most courses presented information outside of the scope of my day-to-day responsibilities in a way that helped me better position me for growth within my organization. For the most part, the classes were very engaging.
- I would have appreciated more time with my classmates in a formal setting to discuss what's working for us and what challenges we have. My peers have a great deal of knowledge and experience, and I would have liked to tap into that a bit more as a group. I felt that the Sunday evening activities could have been better used in this way. I also was surprised and disappointed that the Institute offered an HR course led by someone who is not an HR professional or legal expert. My understanding is that the other section of first year group had an HR pro and found that course to be extremely valuable. I really wish I could have participated with that group or retake this topic with someone well-versed in HR issues, as the presentation uploaded to our joint Facebook group appeared to cover a multitude of important issues.

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



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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Overall, the best educational training program for our industry available. Truly appreciate the flow of the program and the many ways to network with everyone. Some of the speakers were better than others and those were reflected on the evaluations. Some of the core programs should be electives. It would be great to have the Thursday be an organized session of Best Practices within the group. Someone would need to facilitate the discussion to keep people on track and moving along.
- Great layout. I believe that presenters should have modern presentation ... [name removed] has an outdated presentation... and, while I love [name removed], and would not change having him I think he should have more than 1 presentation.... he basically gave same presentation as last year.
- After attending year 1 in Tucson in January and year 2 in Madison my suggestion would be to have more information geared to those who work for larger national associations, or perhaps to hold a networking events for these individuals. I've enjoyed Institute but it feels geared to those from small organizations.
- Some of the courses seemed off this year, as a fourth year student I was hoping for more challenging courses. That said the 4-year experience as a whole was very good.
- Thanks for a great week! Looking forward to next year.
- I loved the networking aspect of the program and getting to see my classmates. To be honest I felt the last year was lacking in programming compared to previous years. Much of the content felt recycled-we had covered it in previous years or it was too basic for a 4th year class. I was also not especially fond of some of the instructors teaching style and/or level of knowledge. Monday was a tough day-having that extra 2-hour class makes it difficult to focus. I would suggest either adding it to Sunday and start a little earlier that day, or end later on Thursday. After 6-8 hours of instruction, you can't really absorb any more info. Absolutely love Madison and overall enjoyed the Institute program! It is so helpful to those who are new to the industry, but also for learning best practices and networking.
- I thoroughly had a great experience and am looking forward to my next three years. Below are some suggestions based on my first time experience: Many speakers referenced GREAT reading materials and books during their classes and in their PPT's. Most are available through ASAE. It would be nice to (1) have a few of those books available for the silent auction and (2) negotiate a discount code for Institute attendees who purchase the books within a 7-10 day period. Shows support of ASAE and Institute partnership.
- Having the pre-paid dinner was a GREAT idea for the class dinner.
- Facebook group is also great!
- I really found the Leadership Class to be fantastic. Very insightful and retrospective. I had great takeaways from all classes. I do wish there was more time to have folks share ideas and best practices in some of the sessions. Overall great!
- Most of the program was pretty good, only found one speaker that was not fully up to our knowledgability standards. Also, would like to have the powerpoint and other things online so that I can print and share them with my board or office staff. Things that I would have liked to provide as teachable moments.
- Overall experience was great! I learned so much that I want to check on, and implement at my organization.

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



MIDWEST

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Institute continues to be an excellent experience. I come back overwhelmed with ideas and have to be reminded to take things one step at a time. The opening reception the assembly was missed. I will make sure [name removed] and [name removed] are on my agenda for next year. All and all - amazing week! Cannot wait for my fourth and final year. Thank you!
- Not all instructors this year had an Association or Chamber background. They should at least tailor their presentations to meet Association/Chamber needs.
- I liked the ability to provide feedback on the speakers. I think that provides a lot of good conversation for the leaders.
- Class rooms - overall pretty good. I am sure you have gotten plenty of feedback about this but the rooms were very cold at times. I dress for it but others were struggling. Presenters - something with interaction works better than one simply lecturing to us. Innovate or die was a great topic and [name removed] was a dynamic presenter but it felt like she was rushing through it plus there was no interactive material. I understand it is not always possible but wanted to share. And, ice available for drinks.
- Overall, I got a great deal out of the week. I had 2-3 classes that gave me great information, insight and tools to help me as I move forward in my career. I connected well with my class and enjoyed meeting all of them. Though, as an association, I did not have the sense of connection and desire to stick with my class over the course of 4 years. Perhaps if I was in the Chamber world... this would be more likely. I was disappointed in a handful of the elective courses I participated in. In the future, my recommendation is to provide more descriptive explanation of the course for us to review when selecting the course electives. There were 2-3 that I felt were VERY specific to Chamber work and tough to make any connection as an association. Had I known the elective was strictly focused on Chamber, I would not have signed up for it. I heard this from many other participants as well. These instances were a waste of my time and money - left me feeling like I simply paid for credits as I work toward my CAE. Out of the entire classes, there were three presenters that I think did a great job. The rest either made no effort to address the mix of Chamber/Association, didn't realize the length of time they had for presenting, or did an awful job engaging any discussion from the class. I have much higher expectations moving into my second year.
- I thought the courses did not offer as many take aways as did last year's courses. Also, everyone was visibly uncomfortable during the "Building Better Boards Class" due to the content not actually being geared towards non/not for profit execs. I had to walk out it was so uncomfortable.
- The class curriculum was ok, but I felt that the teaching was weak. Too general and too basic. I had two classes that were basically the same thing with "Strategic Leadership." [Name removed] was (and is always) a favorite.
- I learned so much during Institute, and I can't wait to return. The sessions ranged from excellent to good, but I completed surveys for each session, so I won't go into details here. This was THE best educational experience of my relatively short career as an association executive. The only thing you could improve is to really stress to the presenters that there are association execs as well as chamber execs. Some of them seemed to lose site of that fact.
- I'm proud to have my IOM. I do think it's a little odd that there isn't any type of exam to earn it. Seems that it's basically an attendance certificate rather than education. I saw a few people in my class shopping and not taking it seriously.

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



MIDWEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- It was terrific. I am so thrilled I was able to be surrounded by industry leaders and to learn from the best of the best. Some of the elective descriptions were misleading. Additionally, some of the lecturers were under prepared. But the lecturers that were prepared were absolutely fantastic! Staff and class advisors were wonderful.
- I would cut back the Monday hours and add on somewhere else if need be. Monday was a little much.
- Some of the classes/content was repetitive. Faculty should coordinate.
- I had a wonderful experience and am looking forward to next year. Most of the presenters/facilitators were up to date with information and resources for the topic at hand. One was a little outdated on the information provided from my point of view. Thank you for the experience.
- I'm fine without a structured event following the Sunday kick-off because I have made connections with folks from my class. It seemed to me that perhaps the class dinners should have been that night for 1st years or for fast-trackers that had little or no connections for the first night. In past years, I've commented on the lack of diversity. This year I had not one, but two female instructors! Yeah! Heading in the right direction.
- I would highly recommend that Government Affairs be an elective class, as many of us don't deal with government affairs within our chambers. I think the money spent for Institute is well worth it, excluding this class as, I received no benefits out of it. Overall, I had a great time!!
- 1. Class advisors should, as much as possible, remain with their class all four years. 2. Bring back IOM water bottles. 3. Move class dinners to Sunday after kick-off to start the bonding earlier. 4. Improve signage to help attendees navigate the facility, specifically finding their room number for electives.
- I thought it might be nice to have the option for 4th years to turn their certificate back in to be redistributed the next morning. It was hard to find a place to put this during dinner.
- Sessions where the class was engaged and asked to contribute were really beneficial. I come from the association side of the attendees, so understand there is some level of focus towards chambers over this, but possibly look to ensure that for core classes, they are not solely chamber focused.
- I thought in general the design and content were top notch. A couple things I would look at, the core classes were excellent and it seemed each was better than the one before it. I took three electives and two were less than expected. I took few notes in these and felt the content was so-so. Also I gave my class adviser feedback that the classes should have shorter more frequent breaks and she said that there was a lot of scientific study that went into the design of the schedule and it wouldn't change.
- Awesome experience! Loved the group dinners which allowed me to build a network and bond with fellow class members. "Homeroom" was a nice feature since it allowed a better understanding of how other nonprofits are run. Awesome food and snacks throughout the week - loved the healthy options. Perhaps add in the notes for first years to bring a water bottle.
- Any thoughts about working lunches or more box lunches. This may assist in shortening the day.

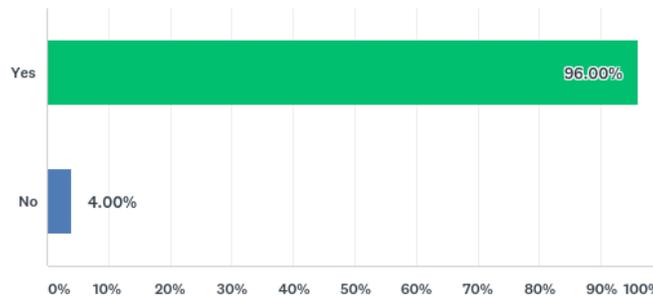


MIDWEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Thanks for a great week IOM Staff! The box lunch we have on day 2 is terrible. This was my third year and I have to say, I was not nearly as impressed with the speakers/take away content as I was last year as a 2nd year. I had a few speakers that have not presented to Chamber or Association folks before, which was challenging. I also had a substitute speaker fill in which was terrible :(I also missed the water bottle we use to get! I would prefer that way over a bag any day :) The venue and food at the Graduation banquet was much better than last year! Love the photo booth!
- I very much enjoyed Institute and am looking forward to next year. I felt that one of the speakers I had was not fully qualified to be giving the classes. [Name removed] was nice and her experience is helpful, but I feel an actual HR person should be teaching the class on hiring, firing etc. She was a great facilitator, just not the proper person to be teaching. Thank you.
- I really enjoy IOM and get a lot out of the program. This year, I found the courses to be less impactful than year one. I took home a few great takeaways, but last year I came back swimming in information, ideas and relevant take-aways. Sure, I've grown as a professional, but I found the educational material was just not on par with where it was last year. The few classes I really got a lot out of were awesome, but there were quite a few that were more or less brainstorm sessions that really weren't that helpful.
- Enjoyed the program but thought some of the speakers were a little weak. Class content did not meet the class topic. Other classes were incredible!
- I have successfully recommended this location to several people!

Q17 Did you leave Institute with at least three or more ideas / takeaways to bring back to your organization?



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



SOUTHEAST

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

2018 BOARD OF REGENTS ROSTER

CHAIR

Bryan Daniels, IOM, CCE, CEcD

President and CEO

Blount Partnership

201 South Washington Street

Maryville, TN 37804

865-983-2241

bdaniels@blountpartnership.com

Term: 2017-2018

PAST CHAIR

Kimberly Dahlsten, IOM

Vice President of Operations

Catawba County Chamber of Commerce

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Hickory, NC 28601

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Term: 2017-2018

Rita Berry, IOM, CCEC

President and CEO

Greater Summerville/Dorchester County

Chamber of Commerce

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Summerville, SC 29483

843-873-2931

rberry@greatersummerville.org

Term: 2014-2018

Henry Florsheim, IOM

President and CEO

Wichita Falls Chamber of Commerce

900 8th Street, Suite 218

Wichita Falls, TX 76301

940-723-2741

henry@wichitafallschamber.com

Term: 2016-2018

VICE CHAIR

Christine Kennedy, IOM, CCE, CPC, ELI-MP

Chief Operating Officer and Executive Vice

President

Lynchburg Regional Business Alliance

300 Lucado Place

Lynchburg, VA 24504

434-845-5968

ckennedy@lynchburgregion.org

Term: 2017-2018

Skip Alford, IOM, FCCP

President and CEO

Greater Palm Harbor Chamber of Commerce

1151 Nebraska Avenue

Palm Harbor, FL 34683

727-784-4287

skip@palmharborcc.org

Term: 2017-2019

Elisabeth Deville, IOM

Executive Vice President

SWLA Economic Development Alliance

PO Box 3110

Lake Charles, LA 70602

337-433-3632

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Term: 2016-2018

Elizabeth Horton, IOM

Senior Vice President of Operations

Greenville Chamber of Commerce

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lhorton@greenvillechamber.org

Term: 2013-2019



SOUTHEAST

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

2018 BOARD OF REGENTS ROSTER

Pammie Jimmar, IOM

Vice President, Small Business and Events
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Term: 2016-2018

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Term: 2017-2019

Beth Morrison, IOM

Vice President of Member Services
Greater Dalton Chamber of Commerce
100 South Hamilton Street
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Term: 2017-2019

Rick Roden, IOM

President and CEO
Greater Jackson County Chamber of Commerce
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Term: 2015-2019

Teri Smiley, IOM, GCCE

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Term: 2013-2019

Carlton Tidwell, IOM, CEcD

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Term: 2017-2019

Raymund Villegas, IOM

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rvillegas@seminolbusiness.org
Term: 2015-2019

Allison B. Walden, IOM, CFRE

Senior Vice President of Resource Development
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Term: 2016-2018



SOUTHEAST

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

2018 BOARD OF REGENTS ROSTER

Scott Waller, IOM

President and CEO

Mississippi Economic Council

PO Box 23276

Jackson, MS 39225

601-969-0022

swaller@mec.ms

Term: 2013-2019



SOUTHEAST

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

AGENDA

OCTOBER 5, 2018

10:15 A.M. – 12:00 P.M. EDT

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

- | | | |
|------|--|-------------------------------|
| I. | Welcome and Introductions | Bryan Daniels, IOM, CCE, CEcD |
| II. | Approval of Minutes | Bryan Daniels, IOM, CCE, CEcD |
| III. | Nominating Committee Report | Bryan Daniels, IOM, CCE, CEcD |
| IV. | Analysis of 2018 Southeast Institute | Board Members/Institute Staff |
| | A. Final Enrollment Report | |
| | B. Survey Results and Discussion of Institute Week | |
| V. | 2019 Southeast Institute | Bryan Daniels, IOM, CCE, CEcD |
| | A. Create 2-3 Strategic Goals | |
| | B. Discussion of Week/Assign Regent Responsibilities | |
| VI. | Institute Staff Update | Institute Staff |
| | A. Program Updates and Looking Ahead | |
| VII. | Other Business/Adjournment | Bryan Daniels, IOM, CCE, CEcD |

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

MINUTES

JUNE 24, 2018

11:30 AM EDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

In attendance: Bryan Daniels, IOM, CCE, CEcD; Christine Kennedy, IOM, CCE, CPC-ELI-MP; Skip Alford, IOM; Rita Berry, IOM, CCEC; Elisabeth Deville, IOM; Henry Florsheim, IOM; Elizabeth Horton, IOM; Pammie Jimmar, IOM; Michelle Kiely, IOM; Beth Morrison, IOM; Rick Roden, IOM; Teri H. Smiley, IOM, GCCE; Carlton Tidwell, IOM; Raymund Villegas, IOM; Allison B. Walden, IOM, CFRE; Scott Waller, IOM; Cally D'Angelo, IOM; Ron Erickson, IOM; Tammi Ford, IOM; Shelley Loe, IOM; Sheryl Smedley, IOM; Heath Taylor, IOM; Mary Taylor, IOM; Erin Williams, IOM; Karyn K. MacRae, IOM, CAE, CMP; Caitlin C. Gayles; Katelynne G. Cox

I. Welcome and Introductions

Bryan Daniels, IOM, CCE, CEcD welcome everyone to the meeting and introductions were made.

II. Staff Updates and Week Overview

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.

III. Photos and Joint Lunch

Group photos were taken and attendees caught up over lunch.

IV. Class Advisor Responsibilities

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. Other Business and Class Advisor Adjournment

Additional Class Advisor business was discussed and then advisors were dismissed.

VI. Board of Regents Business

- Approval of minutes
 - The minutes from the May 9, 2018 conference call were approved with no changes.
- On-site regent responsibilities
 - Regent roles and expectations during the Institute week were explained. This included, but was not limited to: information on when to arrive downstairs every day; how they should network with attendees during meals and social functions; after-hours interaction with attendees; what to do while attendees are in class, etc.



MINUTES

JUNE 24, 2018

11:30 AM EDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

- 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 Southeast Regent Scholarship Fund.
- Additional business and adjournment
 - Any remaining business was discussed prior to adjourning the meeting.

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



SOUTHEAST

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

2019 SCHEDULE OF ACTIVITIES

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

Sunday, June 23

11:30 a.m.–1:30 p.m.
2:30 p.m.–4:00 p.m.
3:30 p.m.–4:00 p.m.
4:00 p.m.–4:45 p.m.
5:00 p.m.–5:30 p.m.

Board of Regents & Class Advisor Briefing: UGA Hotel, Room R
Registration: UGA Hotel, Pecan Tree Galleria
Graduation Rehearsal (*4th year participants*): UGA Hotel, Mahler Hall
Homeroom: UGA Hotel, Individual Classrooms
Institute Kickoff: UGA Hotel, Mahler Hall

Monday, June 24

7:00 a.m.–8:00 a.m.
8:00 a.m.–11:30 a.m.
11:30 a.m.–12:30 p.m.
12:30 p.m.–4:00 p.m.
1:30 p.m.–2:00 p.m.
4:15 p.m.–6:15 p.m.
Evening

Registration: Institute Office, UGA Hotel, Room D
Core Classes: UGA Hotel, Individual Classrooms (*Break: 9:30–10:00 a.m.*)
Lunch: UGA Hotel, Magnolia Ballroom
Core Classes: UGA Hotel, Individual Classrooms (*Break: 2:00–2:30 p.m.*)
Class Advisor Meeting: Faculty/Regent Lounge, UGA Hotel, Room C
Elective Classes: UGA Hotel, Individual Classrooms
Class Dinner Option

Tuesday, June 25

8:00 a.m.–10:00 a.m.
10:30 a.m.–12:30 p.m.
11:00 a.m.–11:30 a.m.
12:30 p.m.–1:00 p.m.
1:00 p.m.–4:30 p.m.
2:00 p.m.–2:30 p.m.
4:45 p.m.–5:30 p.m.
Evening

Elective Classes: UGA Hotel, Individual Classrooms (*Break: 10:00–10:30 a.m.*)
Elective Classes: UGA Hotel, Individual Classrooms
Board of Regents Meeting: Faculty/Regent Lounge, UGA Hotel, Room C
Box Lunch: UGA Hotel, Concourse
Core Classes: UGA Hotel, Individual Classrooms (*Break: 2:30–3:00 p.m.*)
Class Advisor Meeting: Faculty/Regent Lounge, UGA Hotel, Room C
Bonus Session(s): UGA Hotel
Class Dinner Option

Wednesday, June 26

8:00 a.m.–11:30 a.m.
9:00 a.m.–9:30 a.m.
11:30 a.m.–12:30 p.m.
12:30 p.m.–4:00 p.m.
6:30 p.m.–9:30 p.m.

Core Classes: UGA Hotel, Individual Classrooms (*Break: 9:30–10:00 a.m.*)
Class Advisor Meeting: Faculty/Regent Lounge, UGA Hotel, Room C
Lunch: UGA Hotel, Magnolia Ballroom
Core Classes: UGA Hotel, Individual Classrooms (*Break: 2:00–2:30 p.m.*)
Graduation Ceremony and Big Bash: UGA Hotel, Mahler Hall

Thursday, June 27

8:00 a.m.–11:30 a.m.
9:00 a.m.–9:30 a.m.
10:00 a.m.–10:30 a.m.
11:30 a.m.

Core Classes: UGA Hotel, Individual Classrooms (*Break: 9:30–10:00 a.m.*)
Class Advisor Meeting: Faculty/Regent Lounge, UGA Hotel, Room C
Board of Regents Meeting: Faculty/Regent Lounge, UGA Hotel, Room C
2019 Southeast Institute Concludes



SOUTHEAST

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

2019 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

Class Advisors

Teri Smiley

Silent Auction/Fundraising

1. _____

2. _____

3. _____

4. _____

Industry Consultations

1. _____

2. _____

Scholarships

1. _____

2. _____

3. _____

4. _____

Opening Welcome

1. _____

2. _____

3. _____

Big Bash

1. _____

2. _____

Volunteer/Faculty/Staff Dinner

1. _____

Tuesday Afternoon Bonus Session

1. _____

2. _____

Association Specific Event (Optional)

1. _____

2. _____

State Photos (Optional)

1. _____

2. _____

Social Media Strategy (Optional)

1. _____

2. _____



SOUTHEAST

GEOGRAPHIC BREAKDOWN

2018 Southeast Institute

240 Attendees from 29 states and the District of Columbia

State, Number of Attendees, %

Alabama,	17,	7.08%	Missouri,	1,	0.42%
Arkansas,	3,	1.25%	Nebraska,	1,	0.42%
Colorado,	1,	0.42%	New Hampshire,	1,	0.42%
District of Columbia,	7,	2.92%	North Carolina,	24,	10.00%
Florida,	20,	8.33%	Ohio,	2,	0.83%
Georgia,	36,	15.00%	Oklahoma,	4,	1.67%
Illinois,	1,	0.42%	Pennsylvania,	1,	0.42%
Indiana,	3,	1.25%	South Carolina,	24,	10.00%
Kansas,	2,	0.83%	South Dakota,	1,	0.42%
Kentucky,	10,	4.17%	Tennessee,	25,	10.42%
Louisiana,	5,	2.08%	Texas,	14,	5.83%
Massachusetts,	1,	0.42%	Virginia,	6,	2.50%
Michigan,	1,	0.42%	West Virginia,	1,	0.42%
Mississippi,	23,	9.58%	Wisconsin,	1,	0.42%
Minnesota,	1,	0.42%	Wyoming,	3,	1.25%

Top Increases Since 2017:

Mississippi +9

North Carolina +3

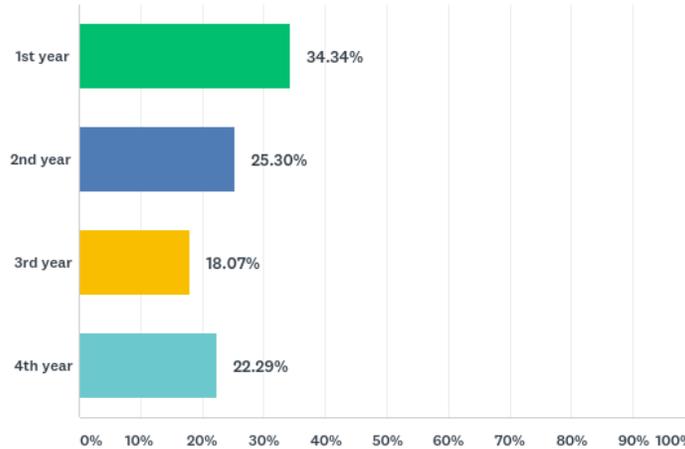
Most attendees in 2017, Georgia with 37

Most attendees in 2018, Georgia with 36

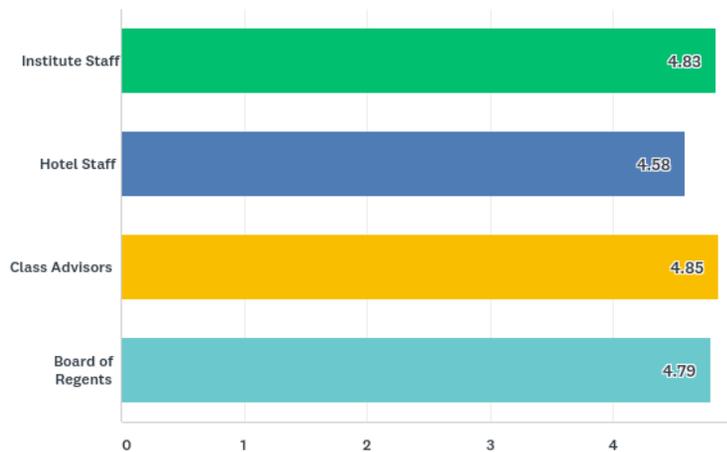


ATTENDEE SURVEY RESULTS AND FEEDBACK

Q1 Your class level:



Q2 Customer Service (with 1 being poor and 5 being excellent):



Additional comments about customer service*:

- The upbeat and positive culture of the leadership and program was great!
- My window was leaking. They did come to look at it, but didn't seem to offer any solutions.
- Everything was great. I switched an elective at the last minute and staff made it very easy.
- The Institute Staff and the Board of Regents was very accommodating to the Freshman Class. Our Class Advisor [name removed] was outstanding and our class hopes you will bring him back next year to continue to be our Class Advisor.

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



SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I needed a printer one morning during break and the IOM office staff didn't make an effort to help. Perhaps need to consider setting up a workstation for folks who need to check in to their offices since getting to the Hotel work station is difficult during the short time allotted. Also, at the Big Bash, there were several IOM staffers who sat at our table when two attendees came in late and couldn't find seats. No effort was made to move to accommodate them.
- Enjoy [name removed], she made everyone felt great to be there that week.
- Hotel front desk lady was curt and they failed to instruct me on how to open the closet door (it looked like a hotel room connector door) I tried to open in and could not so I thought it was actually a connector door. I had no closet all week. I hung my dresses on the door stop.
- Everyone appeared to have a "full plate."
- I had a great experience with everyone that I came in contact with.
- Institute staff seem nice but don't interact with them much. I spoke with 2 ladies to help get me a new certificate as mine has a black streak down the middle of it. They were nice and said it would be August before it happened.
- Institute staff standing in the hallway with the loud music and overzealous greetings was very annoying. A calmer greeting would be welcomed. Overly strict time frame for classes is ridiculous. Sitting in the room waiting for the clock to strike the exact end time is absurd.
- I was blown away! Life changing experience.
- Each year I have been impressed by the UGA Hotel Staff, their attention to detail, and the food, etc. Unfortunately, I was not this year. I personally am Gluten Free and there was a regular cookie in my lunchbox. This could have made me really sick if I had taken it without looking and asking the question. The label also said it was a totally different sandwich than it really was. The food was so bad the first day and made many of us not feel good that we ate off campus from there on out. No genuine feelings that the staff cared this year.
- There was plywood over my window for the first few days in Athens due to the construction. I completely understood the need and had no complaints. On Wednesday, I had a long handwritten note slid under my door from the hotel manager apologizing for the inconvenience. I received a discount on my hotel stay for the days the plywood was on my window and also gift card for a free cup of coffee. I truly appreciated that gesture from the hotel manager.
- Excellent Customer Service. They must have learned from [name removed]!
- Wish we knew who was in charge on the first day through a general assembly or first year welcome session.
- I loved the "pep rallys" before the start of each day.
- WOW! Completely blown away! The hotel staff was spectacular - especially considering they are students.
- Only met my board of regents person during the homeroom introductions, so it is hard to rate this.
- I truly missed the opening reception and karaoke at the Foundry. This was a great way to meet folks from other class years. Since losing a half day of class, we have less and less time to network. Most of us are Chamber folks and we have built our communities successes through networking.

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



SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Institute Staff- I hardly saw them or even knew who they were. I had one encounter with them regarding my credit card processing. I felt as though they made it my issue that they could not process my card. I had to find them in their office and help troubleshoot the problem. I still have not received a receipt.
UGA Hotel Staff- I felt they were overwhelmed and understaffed.
Class Advisors- My advisor treated our class like children and did not give us the respect of CEOs and professionals. Among her duties, she did not provide adequate snacks for the class and did not decorate the room to encourage us and get us energized and motivated.
Board of Regents- I did not know who they were most of the time because they were never introduced to us. I had one encounter with a Board member on the box lunch day. I am pregnant and cannot eat deli meat unless it is heated due to bacteria. I asked this Board member to point me in the direction of a microwave and she shrugged and said she didn't know. I was appalled at her unwillingness to accommodate and her demeanor.
- I've had wonderful advisors all four years.
- I was disappointed that Institute Staff started breaking down the background banner at the Big Bash before the event was over. If we did that at one of our Chamber events, our members would be very unhappy. There is also a lack of transparency on how things run at institute. When I asked a Board of Regents member about budget cuts, they didn't seem to know who made the decision or why it was made. When I further probed, how are the Board of Regents selected or how was the Chair of the Board selected, there was further muddling and confusion. After three years in Athens, I now realize that this is all staff-driven and the Board of Regents are basically volunteers. But tell us that! Be transparent! It's all good. Regarding the customer service rating above, I want to explain my rating. I gave Institute Staff a 2, not because anyone was unfriendly or unhelpful. Everyone was great. However, there is a serious transparency problem (I feel a little duped) that I hope you rectify going forward. Does the Board of Regents have any formal role whatsoever other than volunteering? I am now inserting other general comments here, because there seems to be no other place on the evaluation form for this. There were WAY too many cuts. Just WAY too many. That's why I will not recommend this program to anyone, until cuts are restored. I would actively caution my Chamber colleagues to avoid for now. Examples: 1. Opening reception (needed to welcome people and get to know them institute-wide) 2. Karaoke night at the Foundry (again, was a great event to socialize with others beyond your class. We spend all day with our class, and have a class dinner. Would be good to have this event back. 3. Champagne toast at Big Bash (so absurd to ask us to "raise our glasses" when you only gave them to Class 4 this year. That was just weird and gauche.) 4. Water bottle (really? You even cut this small item? We noticed.) 5. Snacks were severely reduced in quantity and quality both at breaks and in the classroom. 6. Big Bash pre-reception—let the drink tickets count for hard liquor as well as beer or wine, it's only a dollar or two difference. 7. Lunch was reduced to unacceptable quality (the Monday pasta lunch was an all-time low)
If the food quality for lunch will be so poor, then I would rather you cut lunch completely and invest in the opening reception and karaoke night. Let us get lunch on our own, perhaps give us an extra 15-30 minutes for lunch. Or serve breakfast instead of lunch. As things stand, I plan to skip all lunches next year and eat off-campus. Many of my classmates plan to do the same.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- The customer service was fine. To my knowledge, I did not interact with a Board of Regent, but, I am sure their customer service was excellent.
- I didn't have any interactions from the Board of Regents or Hotel Staff.
- Everyone at UGA was great. We had problems with water getting in some rooms from the storms and they were there to help.
- I absolutely love the post-it notes on the doors every morning. Also, I love how the board is in the hallway every morning and at 11:30 on Thursday when we finish. Those small touches really go a long way!
- The staff at UGA appeared to be under staffed or overwhelmed, therefore making service rushed or slower than it should have been.
- Everyone I encountered had a smile on their face, and were eager to help!
- Our hotel room was very clean & fresh towels, etc. The front desk staff was very helpful. My class advisor was amazing and was very helpful.
- Encouraging and excellent.
- The front desk seemed lost when I asked some questions. Reservations had to be made at 9am the next day...no 24 hour service.
- Some of the Board of Regents act like a bunch of snobs.
- Interaction with Board of Regents was less than in first year, not sure if this had to do with not having the introductions after homeroom on Sunday or not.
- I didn't have any interaction with Institute staff and didn't really know who was on the board of regents since we didn't have an opening ceremony. We missed out tremendously by cutting that event. I thought attendance was down because I never saw the collective group all together. This event also gave us a chance to interact with people in other class years. I barely met anyone this year outside of year three. And the food this year was awful. The box lunch was fine but the other meals were inedible. Maybe allow the classes to leave for lunch and allot an extra 30 mins or so and a list of places to go/coordinate the shuttles. Just an idea. Our class advisor didn't decorate the room, didn't bring good snacks or enough for a week, and treated us like students at first. We are all adults and are used to running events such as this. When you're a higher level class (year 3 and 4) we know the rules and expectations.
- Everyone associated with Institute was very friendly and helpful.
- Hotel was dated and a bit run down.
- [Name removed] was a terrific staff advisor. Kept us informed and inspired!
- [Name removed] is the #1 class advisor. She was amazing!
- Loved the runway each morning. A great way to get your day going!
- Everyone was very helpful and made me feel welcome and excited!
- Everyone was fantastic. Super helpful. Fun. Loved the welcome and goodbye's in the hallway!
- I felt that customer service was at its best during the entire institute.
- It is obvious that a lot of dedication and pride is put into the Institute program.
- Hotel staff seemed overwhelmed and unprepared for our group.

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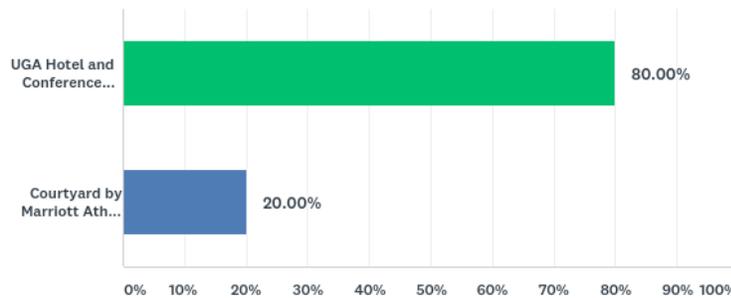
SOUTHEAST

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- [Name removed] was a fabulous Class Advisor!
- Did not have any dealings with the Board of Regents.
- I had a great experience over my four years at Institute!
- Were told our class was not allowed to take additional class photos on the stage at our graduation, yet other classes were allowed to do so. We were forced to take photos in the hallway instead.
- The customer service provided was great. Every time I had a question a solution was given.

Q4 Which hotel did you stay at?



Q5 If you stayed at the UGA Hotel, how would you rate your accommodations?



Additional comments about accommodations*:

- Hotel was under construction. I look forward to it being finished, it's going to look great. Walls were rather thin, though. I could hear every word of the guy's phone conversation next door at 12:30 a.m. Had to bang on the wall to ask him to keep it down.
- The property at Country Inn Suites was in need of major maintenance. Our room was not cleaned for two days and it was hard just getting clean towels. The pool was shut down and the property was shabby.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- My room was under construction so it had plywood over all windows. They did give me a credit on the room which was very nice.
- Construction was a bit of an issue but it is understandable. Nice being located on site and I have already booked for 2019.
- The staff was great and also make sure everyone was taking care of.
- Nice furnishings and clean but right next to elevator and no closet.
- UGA managed well considering the construction.
- Meals/lunch were not very good. Evening meal for Big Bash was a better meal than others.
- Very convenient to have the classes where the hotel is.
- No closet which meant no hangers, iron or ironing board. Housekeeping tossed brochures that had been collected.
- They boarded up my windows on the last day. No sun light could come in.
- I loved being in the same building!
- The bed in the hotel is quite comfy. However, the room I was in this year smelled a bit musty. It sounds like the rooms are getting updated anyway so that probably won't be an issue next year.
- Having to use the back elevator due to hotel construction was very aggravating. But I know it will be better next year. Love the UGA van service. Great benefit to staying at UGA.
- Suggest that the hotel bar stay open later than 10pm.
- The rooms were nothing like pictured online. I realize they are undergoing renovations but the room was extremely small, loud hallways, etc. I was very disappointed on that aspect but it was clean.
- Small sink space - felt more like a dorm room than a hotel. Not enough lighting.
- Shuttle service was appreciated and very convenient.
- Not that it is the fault of the hotel, but the food choices were poor this year. Monday lunch was very sad. Break refreshments were not as good as in the past. Additionally, we drink lots of water at these functions. Perhaps bringing back the IOM water bottle at check in would save some money on bottles purchased from the hotel. I've seen IOM do this very well before. I faith you can do it again. Overnight accommodations are fine. I fully understand the challenges behind the renovations. I did have the kindest note in my room from the front desk manager acknowledging the challenges of staying in a room under renovation. I see that they are just bettering for the future. No harm, no foul.
- Rooms are small.
- I have stayed at Holiday Inn for 3 years now and have always enjoyed my stay. I love the amenities provided there (pool, gym, restaurant) and the staff there. I also prefer being closer to downtown where we usually go every night of the week.
- I had a plastic sheet over my window, so I couldn't see out it. With that said, it is very convenient to have the hotel and the conference in the same building, so I wouldn't have changed that.
- My room was extremely small. It also had somewhat of an odd smell. Was not impressed!
- Glad they are renovating - the rooms need it!

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SOUTHEAST

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Hotel stay was nice, and they offered 10% discount due to construction.
- Overall it was a good room, despite being a little small.
- The reason I went with 3 is that I understand that there was remodeling going on and hope that is all finished by next year.
- Construction (which is needed) caused some confusing and had certain things blocked off.
- The hallway smelled; the rooms are small; the construction workers began working at 7:30, making a lot of noise; there was no room for luggage; the blow dryer did not work, even after resetting the outlet.
- Enjoyed Hyatt Place 10/10.
- The staff was so helpful. Every year I let them know. Wonderful customer service. I just had one problem. Waters was coming in my window and the staff helped me pack and moved me to another room.
- A little outdated--but I know they are renovating. Hopefully the accommodations will be more up to date next year.
- Room was very small, especially the bathroom. Felt like a slightly remodeled dorm room. But couldn't beat the location! AC did not appear to be working in the bar area.
- I had reserved a suite when I left last year and when I confirmed closer to time, they had me in a regular room. Other than construction happening around us, they were accommodating.
- Hotel is being renovated.
- Really need a gym on premises.
- Hotel stay and host/staff exceptional - hotel was dated could be more appealing.
- It was very reasonably priced and a short distance from UGA.
- It was under renovation, so it was different this year, but my room was barely affected. I did have classmates with flooding and boarded windows. I did find it strange that these rooms were booked during this time.
- Loved being in a room on the 2nd floor.
- I stayed in a newly renovated room where there was no construction. So my experience was great.
- Under Construction, but did not impede the event or the rooms.
- My co-worker and I stayed at UGA all four years and they were very accommodating to us both.
- I could hear every word from the hallway in my room. My window covered due to construction. I understand it was necessary. I may stay somewhere else next year.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q7 If you stayed at the Courtyard by Marriott Athens Downtown, how would you rate your accommodations?



Additional comments about accommodations*:

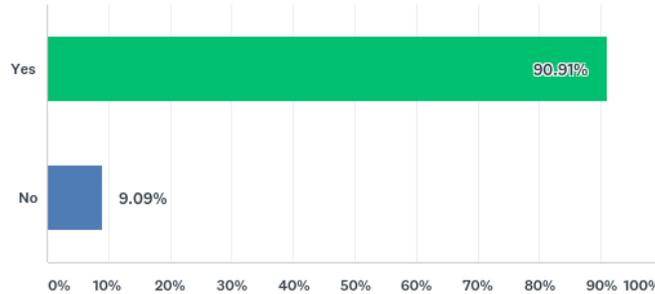
- The Holiday Inn, that we stayed at in 2017, was still cheaper than the group rate at the Marriott and closer to campus.
- Would love shuttle service from Holiday Inn location as I didn't have a car, UGA was full, and additional shuttle location required me walking in the opposite direction of center. Walk was fine when it wasn't raining.
- I would like to see breakfast handled a little different (with continental breakfast or room service).
- The Courtyard was very nice and I enjoyed their room accommodations very much. Also nice to have the shuttle still! Thank you.
- The renovations were welcomed.
- The front desk staff at my hotel were super friendly and very accommodating as well as the restaurant staff. I was just disappointed with housekeeping. When I returned from classes Monday my room nor my bathroom had not been cleaned - my trash was full, no clean towels and the bed was still unmade. Same issue Tuesday as well except they made the bed.
- The hotel staff were very friendly and housekeeping did a fantastic job. This is my third year staying at the Courtyard by Marriott Athens Downtown.
- No complimentary breakfast was a huge disappointment for the cost.
- No complaints about accommodations and the shuttling was very much appreciated. Only issue at Courtyard was that they confirmed I could get early check in when I called, and then weren't able to accommodate when I got there.
- Very small bathroom. Missed room service for 24 hours. Shuttle service between Courtyard and UGA was fantastic. Prompt, clean and the driver was very personable.
- The room was very comfortable. I enjoyed being able to get a quick and easy breakfast each morning in the lobby.

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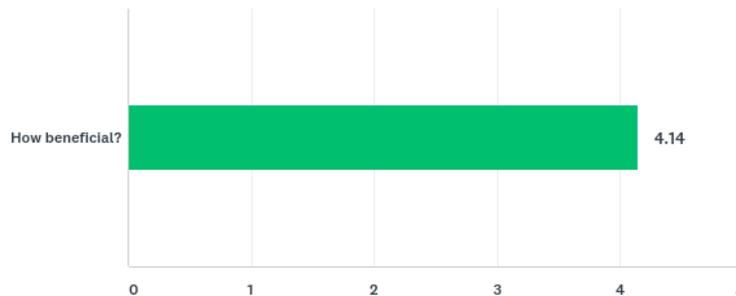


ATTENDEE SURVEY RESULTS AND FEEDBACK

Q9 Did you download the 2018 Southeast Institute App?



Q10 If you downloaded the app, how beneficial was it?



Additional comments about the 2018 Southeast Institute App*:

- I thought getting the handouts from the app were the big plus!
- I wish when you chose your personal schedule that it stayed on that schedule until you changed it. Each time I opened it I had to go through steps to see my schedule only.
- I didn't use it once I got there.
- Having to add the electives was not efficient.
- I used it for surveys.
- Would be nice to sort directory by class.
- I used it a couple of times for scheduling purposes, but never did pull anything up on it. Being in class and paying attention is most useful.
- Thank you for the IOM App! It is very beneficial.
- It was very helpful to have all things in one location.
- It would be helpful to see last years electives. I believe I took the same class two years in a row.
- Great, worked well and was very beneficial.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Eh, its ok.
- Appreciated the directory, the schedule, downloads, etc. Please use this again!
- Although I downloaded it, I didn't use it. I'll try again next year!
- I felt it lacked it's previous luster this year. I am also all for saving paper but having to do the reviews through the app made it much harder to remember when we were being rushed from class to class.
- I loved being able to have my schedule on the app and be able to do the evaluations on the app as well.
- It was not as user friendly this year.
- I liked doing the surveys on the app.
- I referred to it several times. Love it!
- Very useful. It helped me keep up with the schedule for each day, the bus route and pull up presentations.
- It was very helpful.
- I can totally see the benefit of compiling the surveys in the app. I am afraid that many of my classmates didn't complete the surveys or complete them when the class content was fresh on their minds. Great way to keep the bus schedule, though.
- I used the app everyday to see what my next class was, the time and location. It is much faster than digging for a paper schedule.
- It was not the easiest to use, it was confusing trying to add my own schedule, until I got to Institute and understood what was going on. I liked having the speaker handouts on the app. The bus schedule was really nice. All together worth it!
- Great! I wish I would have utilized it more! I think we must stay up to date with technology and continue moving in this direction (i.e. evals on the app).
- It was ok, but it had some bugs. For instance, I wanted it to default to "My Agenda" but instead it defaulted to today's agenda with all classes. Also, it didn't remember where I left off, and some of the "back" buttons acted a little weird, took you to places you didn't expect (not back). I give it a 2.5, but I rounded up to a 3. There should have been an easier way to add my core classes to my schedule, or even better log in to have my schedule already customized. If you do that, be sure to keep the instructor evaluations anonymous. One major plus: instructor evaluations were very easy.
- This is not about the app, but I do not see a place to add additional comments about the IOM experience so I will add it here. The biggest disappointment was the lack of networking opportunities. They seemed to be all, but eliminated and I felt sorry for first year attendee as there was no kick off reception/pep rally to learn who our IOM staff and Regents are. That elimination truly took away the "SPIRIT" of Institute. As a professional who puts on many successful events I have a high expectation as do the rest of my counterparts and I was definitely left disappointed from networking to the food, which was terrible. I respect and greatly appreciate the bonds I have made with my class and the instructors and what they offer, I am just very disappointed in the "SPIRIT" being lost.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- It would be nice if I didn't have to scroll to find my classes. If we could only have our classes and electives show up all at once, that would be great. If there is a way, I wish our class advisor would go over this.
- It would be awesome if my classes were already assigned to me instead of having to create a schedule in the app.
- I liked surveying through the app but I don't think the last blank should be a required field.
- I could be wrong but I think a couple of pieces of information in the app were different from some of the paper handouts. Definitely liked completing class surveys in the app. Maybe encourage participants to complete their profiles in the directory in advance.
- Poor interface.
- It really helps.
- Directory picture size is not helpful (way too small/no way to enlarge) from mobile device.
- It did not import the schedule easily.
- I couldn't find it when searching for it. A lot of people in class were having this issue.
- The app is a little clunky. If you choose a session and then go back to main screen, it takes you all the way back up to the top instead of returning you to where you were.
- Little bit clumsy navigation but was good for completing the surveys and accessing some of the presentation powerpoints.
- Loved having everything in the app!
- It was cumbersome to use.
- I think the paper surveys are best. Many of us forgot to do them and the presenters forgot to remind us.
- I would love to see a direct link to the silent auction on the dashboard.
- I know there's been issues about the app and having to sign in every time and I think it was being worked on, but can we please fix that?! Wish there was an easier way to input my classes.
- Where the attendees are all listed, allow the option to break up between classes (ex: 1-1).
- A pain to add things to your personal agenda. I had trouble with posting photos. I didn't then bother with much else then.
- I missed the printed course surveys. Since I had a printed course schedule, I really didn't need the app. If I didn't have the printed schedule, then I would have relied heavily on the app.
- This year's app was much better than past ones.
- Can't imagine not having it. I used it constantly throughout the program.
- The app was amazing, especially for a first year attendee. It made getting to know a little bit about my classmates very easy. My only suggestion would be to encourage attendees to upload photos to their profiles to make identification and recognition a little easier once on site.
- Liked having all info at fingertips.
- Didn't use it. Relied mostly on printed schedule and other materials.
- Would be good if we were able to automatically download our schedule based upon our name or login instead of having to manually input everything.

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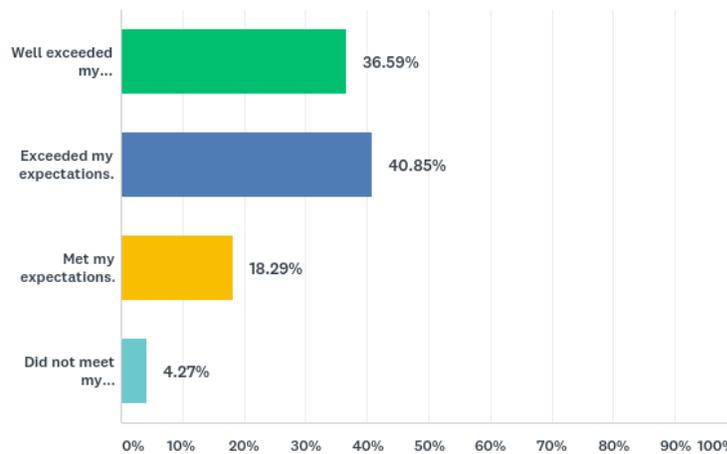
SOUTHEAST

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

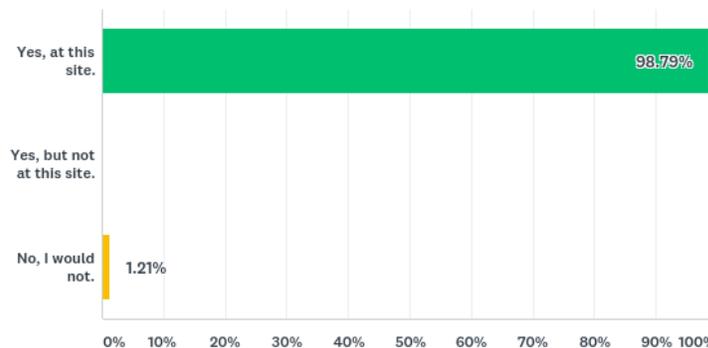
ATTENDEE SURVEY RESULTS AND FEEDBACK

- The app needs to automatically generate your schedule/calendar based on what you have registered for, without having to add each individual class to my schedule.
- I wish that there was a way to just see your schedule, without manually having to add every class. Since it's tied to our email it should be able to do that. I only used it for the reviews because of that.
- Best App to date. I did the evaluations when I got home, I should have done them after each session, but great app.

Q12 Overall, to what extent did Institute meet your expectations?



Q13 Would you recommend Institute to other nonprofit professionals?



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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

Additional comments*:

- Why not offer a class on Sunday since we have to be there for checkin. Monday's schedule is too long.
- I love getting out so early on Thursday. I wish the bar was open prior to the dinner Wednesday night.
- This was the best professional development money I've spent in a long time. I liked that it was classroom style, packed schedule and promoted comradery among the groups. If I'm going to walk away from work for a week, I need it to be well worth it and this definitely exceeded my expectations. Can't wait to come for another 3 years!
- Institute was wonderful and I met some fantastic people. We were made to feel extremely welcomed. Looking forward to next year.
- I am not sure how scholarships are determined for non first years, and I may be a unique student. I am paying for this institute myself with no assistance from my organization. It is not an easy budget item to save during the year. Because of that I am unable to give much, or at all, to the scholarship fund. It would be nice to know what criteria is used in making these decisions.
- For obvious reasons, I changed site every year and missed the experience of bonding with the same set of classmates but Class 4-1 made it up. I felt warmest of welcomes! The warmth of Board of Regents challenges me to volunteer.
- I liked the classes and the instructors, and I like my classmates very much and look forward to continuing through the program with them. That said, I wish our classes, or groups, could be a little more customized for our size Chamber. I work at a very large Chamber (which is unusual, and I know I'm lucky) but I don't encounter much of what my fellow classmates encounter in their daily jobs. Because of that, some of our conversations ventured into the nitty gritty details, and that stuff didn't apply to me. I don't mean for that to sound uppity, I just wish I could have been grouped with people in my profession (Marketing/Communications) or maybe there could have been a side group meeting with other Marketing people.. etc.
- I thought that the conference seemed more empty than in years past, and that the food and entertainment was cut way back from years past.
- The first day of classes on Monday was way too long.
- I was disappointed that on the first day we didn't go into the auditorium and meet the board. Also, I feel like the long day on Monday along with the class dinners was a lot for one day. I say do class dinners on another day that isn't so long. If you aren't going to do the Sunday night thing any longer, maybe do dinner that night (I realize some places might be closed).
- The Staff, Advisors and Regents are all so helpful, patient, and professional!

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SOUTHEAST

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Better communication on the first night possible mixer like before.
Food - I would be happy with the box lunch on all days versus poor food.
Graduation Celebration - We had a wardrobe malfunction and 3 of us left to help sew a dress for a graduate. We were unaware the class pic would be taken during this time so we are all excluded from the group photo. We ask to take another photo in front of the back drop and was told we could not by the board of regents. We went into the hallway to take a group photo and this was not used by institute so we are missing from posted group. Also the hotel ran out of dinners at graduation and as graduates we should have been served first. Graduation was a disappointment this year. I paid for my husband to attend and then I was the one waiting 30 minutes after everyone finished to be served. I know things happen but I was disappointed the graduates were the ones left out.
- I would like to see a Monday night event brought back offsite, bringing 1st year participants together with returning participants. Having a karaoke event my first year definitely offered a way to better make connections not only within my class, but of all participants.
- I was surprised that Institute did not offer the Welcome dinner on Sunday night as they had in my first year. I think we should have a dinner for us that night as we had to pay for our dinners both Monday and Tuesday night.
- Lunch was not the best. I would like to see healthier options offered rather than heavy stuff like pasta. Teachers were great and staff and volunteers were helpful and friendly. Thank you for all the time and energy spent to put this together.
- I truly enjoy my week at the Institute the curriculum are great an on point to help you understand your roll as a chamber person.
- IOM exceeded my expectations. I look forward to 2019.
- The classrooms were freezing and the Guide to Governance and the Financial classes were next to a class that was very loud and disruptive. Hard to concentrate.
- This was a fun year because I already knew my class members. I thought it was odd that you would have us show up on Sunday only for one hour of homeroom. I don't know what's happened in past years that caused problems with opening ceremonies or the dinner, but what was planned this year wasn't the right answer.
- I think classes should be 90 minutes. Add additional classes to obtain necessary hours. I think there should be open conversation for the last 20 minutes of the class. Discussion could be about what was presented or an issue that a chamber is having.
- Too cold! I was freezing everywhere and it was impacting my ability to focus. I loved everything else, I thought the content was great and I loved the people and the learning. I loved the 40 ideas in 40 minutes; I'd love to have a session that broke organizations into groups that had unique situations--ex: I'm a small chamber with very limited resources, I'd love to brainstorm with students of all levels to talk about challenges and opportunities unique to this segment. Overall, I'm so glad I made the last minute decision to attend.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Southeast Institute is the best and UGA is the best site!! Just a couple of suggestions: please host a reception the first night right after homeroom and introduce the Board of Regents, a different lunch for the first day would be great. The staff was wonderful this year and I love all the personal touches at Southeast - goodie bags, notes on our door, music and high fives every morning. You don't find this southern hospitality at other sites.
- First year participants need a meet & greet event on their first evening. This leads to bonding that carries on through the 4 year program. I would recommend bringing back the reception prior to Big Bash even if the cost means not having 2 plated meals at lunch. If lunch time permits (or is extended by 30 min. on one day) it might be better to allow dining in town at various restaurants. Or possibly bring in food trucks for lunch and/or on opening night. There appeared to be budget cuts this year that were not as noticeable in past years. Thank you for all the effort put forth by volunteers and those with IOM experience!
- Overall I believe that Institute served its purpose. The speakers were dynamic and engaging. The classmates were very engaged and present. The food wasn't the best, I completely understand how difficult it is trying to accommodate so many people. Overall, I believe it was a very well thought out conference.
- The food, the dining room lunch options are awful. I'm done now and guess it doesn't matter but what's wrong with just having a salad, sandwich and soup bar? However, in my 4 years the Big Bash dinner was BY FAR THE BEST.
- My biggest recommendation is to alternate the facilitators every other year or so. While I know they all put their best efforts in, you can't help but feel like you get a similar lesson when its the same person four years in a row.
- In year two, I didn't feel as connected to the Board of Regents or Institute staff and as a result, not connected to the rest of the institute classes as we were last year. Would have loved a "welcome meeting" that could have kicked off the week for the SE Institute as a whole. Last year I knew that [name removed] was Chair... this year, I don't think I know who the chair is!
- This year there were many changes to the schedule of events, some of which I believe were good changes but some I really think were missed opportunities to network. I am speaking of the Kick Off Bash on Sunday evening that had been removed from the schedule. I really miss the networking with other Chamber & Association professionals and actually meeting the first year students and making them feel welcome.
- Thanks to everyone for their hard work in putting together a great week of learning and fellowship.
- It was a very good combination of class time and networking. I heard some others mention that in previous years there were lots of social events, rallies, etc. This does not appeal to me at all--I liked having unstructured time with my peers and instructors.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I appreciate Institute so very much. The connections I have made with my classmates will last a lifetime and have been incredibly beneficial. As for the program this year as a whole, it was by far the least impressive year. Those that have been before felt the stark contrast of not having a welcome ceremony and it felt awkward for the 1st year students. That is a big part of the buy in for the program, getting them excited and allowing all of us to get to know the IOM staff, Board of Regents, etc. I spoke to many first year students who informed me they planned to fast track, which made me sad for them personally due to the close bond our class has formed. As I mentioned previously, the care and quality of food and the staff was not there this year at the UGA center. Our class ate elsewhere after the first day because of it. I felt a couple of the core classes in the curriculum, while good, weren't worthy of a full three-four hour course. All in all, while it was still worth while and a great program, it lacked the overall luster that engaged the students from the get go. Hoping to gain that luster back for our graduating year! Thank you for allowing our feedback and I look forward to 2019!
- I missed the big kick off on Sunday afternoon in the auditorium. I feel like it's a great way kick off the week and let everyone, especially 1st years know what is coming up. All in all, great week as always! I learned so much and can't wait to stay implementing. Thank you!
- Food was better than last year but still not great. I missed the full group opening on Sunday night. It felt like we missed out on the whole group inclusion by not having that. Suggest opening the cash bar before graduation. Overall, I love Institute, the experience and knowledge! Graduation was excellent. You sure do know how to make graduates feel special! Keep up the great work!
- Transpo to and from hotel was great - which there was an opening session with keynote, welcome, orientation, etc.
- Well worth the money.
- I am consistently impressed with the level of excellence across the board at IOM Southeast. From the top down! Every year I leave with so much to take back and apply. This year I was blessed to receive a full scholarship. Saving those dollars has a substantial impact on a small chamber. Thank you again for choosing me as a scholarship recipient. Already looking forward to next year!
- Don't take away the kickoff.
- Thank you! Being my first time to Institute it was an amazing experience and I look forward to the next 3 years. Just one comment about the accommodations, please consider the Holiday Inn as an accommodation choice. it was conveniently located and fit my budget needs. Also, as a consideration, the bus shuttle service passes the Holiday Inn, it would've been very convenient if it could have made a stop there.. Thank you again!
- I loved every aspect and have already made reservations for next year. My one takeaway was that it was sad that we were not able to really meet the other classes. Except for breaks we had no interaction with the other classes. Would be nice to have had a mixer the first night or maybe the Tuesday night to meet them.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I overall enjoyed the week. I feel like I learned a lot of useful information, some of which we are already implementing. The only thing I would change for next year would be the food offered by the UGA Hotel & Conference Center. The lunch provided Monday and Wednesday was very heavy and not very good. Food was overcooked or under-cooked. It was also not appropriate to serve such heavy meals in the middle of the day then expect attendees to stay awake during the afternoon classes. The boxed lunch was honestly the best meal other than the dinner provided at Graduation that we had all week.
- I feel like you should have a separate class for 1st less than 2 years or even 1 year Chamber or association students. I have been in the Chamber business for 10 plus years and the first year classes are very elementary for someone who has been in the business a long time. You need to separate and let the newbies in the business take those beginner courses and those that have been in the business for a while take other courses that would help us.
- It would be so helpful if you provided healthier food options. Grilled chicken, veggies, even soup and salad bar. The box lunch was better than the others, and it was the only meal I could eat this year and maintain a healthy diet.
- I feel Institute is a going to be a huge influence on my career.
- Would have been great to have been able to park at the Conference Center without having to pay daily. Having a function with dinner on Friday night would have been great since everyone had to travel that day.
- I would have liked to know who was in my class (as a first year) earlier so that we could start to interact before Institute.
- Overall a great experience and program. Advisors and speakers have all been wonderful. Getting out at noon on Thursday is very helpful with travel arrangements. A couple suggestions...Reiterate with service staff during banquet that the ""head tables"" are to be served first. I along with 3 other graduating class mates were told they ran out of food and that we'd have plates soon. We didn't get our plates until almost 8 and by that time the rest of our class had finished. Keep instructions/rules consistent and make sure everyone is aware individual photos AND class photos will be taken prior to dinner. During our photos we were told they would only be individual. Since there wasn't an announcement three members missed our class photo. When asked if we could retake it on the stage during dinner we were told no and instead took it in the hotel lobby by the stairs. Afterwards, several other groups went to the stage in the banquet hall to take photos; one even announced from the podium.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I missed the welcome ceremony that we have had the past two years. It is nice to see all of IOM together as one big group. Also, this was a great time to introduce the Board of Regents. This year, I had no idea who was a Board of Regent and who was not. A lot of the first year students absolutely had no clue. I also missed the opening reception. That was a great networking opportunity and to see everyone from previous years of attending IOM. The lunches were very heavy for a lunch. Pasta, enchiladas, soup, huge sub's and tons of sweets and sugary items at breaks. It would have been very nice if the lunches were lighter, or we had a buffet options each time for meals. There were very limited healthy options for anyone. I realize I may be the odd woman out, by trying to be mindful in my food options but, the breaks and lunches were not only very unhealthy but also, not very tasty either. I realize pasta is a cheaper option but, the meals just were not appetizing at all. I barely ate during the day at IOM. Also, at dinner, I am not sure why the bar was not open until after the graduation ceremony. Once the ceremony was over we did not have much time to use our complimentary drink tickets before the host bar closed and the cash bar opened. These are just my opinions. Overall, IOM was great. The education and networking opportunities is what is most important.
- I would advise that the Class Dinner not be appetizers. After a long day, you would really like to sit down with your peers to an actual dinner with places to actually sit.
- Although this may be hard and may not even be possible, it may be beneficial for associations and Chambers to have class separately. A lot of this pertains to a Chamber and I think it was difficult for people in associations to sit through a class in which more than half of the participants were talking about Chamber things. Something worth noting is the food. Pasta for lunch is hard to recover from! Something like a good protein with veggies would be easier to process. The food was great taste, I think it was the choice of meal that bummed a lot of attendees out. The Savannah room for first year attendees was incredibly small for all of the first years- so I would suggest using a larger space for us all to meet on the first day after class. Snacks, ice cream, water, and soda was a great idea and wonderful to have. Breakfast is the most important meal of the day and all the hotels offered when signing up for institute DON'T have breakfast! There was a lot of complaints about no breakfast at UGA and Courtyard. Holiday Inn Express had breakfast.
- While I understand the need for "seat time", that is way too much time to just sit. I would love to see some alternative learning methods than the lecture/powerpoint method.
- It is an amazing experience. I can't imagine serving in the role of ED of a chamber or any non profit without this educational experience. I love my class along with the other networking opportunities as well. Monday is a long day. We discussed that we would be willing to have some class time on Sunday. It seemed like Sunday was somewhat of a waste this year. If it helped make Monday a little easier, it may be something to consider. A large portion of our class stayed at the Holiday Inn again this year due to the convenience of downtown and evenings. We took turns driving each day so that shared the expense of parking. We would like to see it added back as an overflow hotel with shuttle service each day.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Some of the material for 4th year did not seem to "dig deep enough" but rather just "hit the surface." The food was not good for lunch on day one. Heavy, flavorless pasta before hours of sitting is NOT a good idea. What happened to the kick-off event? I think the snacks available during registration was a nice touch, but missed the kick off event before/after home room. Fortunately, as a 4th year, I knew where to go and saw familiar faces. What about first timers who didn't have that knowledge? The kick off event gives everyone an idea of the lay of the land, creates a sense of community, and starts the weeks of strong. It needs to be brought back. I think the state pictures were more fun at the big bash, with everyone dressed up and in front of the Institute backdrop. They could be done they same way they were during the break, quick and in alpha order. A little upsetting that we were not made aware of a class picture to be taken after our individual pictures. A few of our classmates left to handle a wardrobe malfunction and were left out of our picture. When we realized and asked to take another, we were told not to get on the stage. Overall, the IOM experience has been one I will remember for a lifetime. Some of the changes over the years have been fantastic. Some, not so much. Biggest hope for future attendees is better and less carby lunches and bringing back a stronger start on night one.
- Some of the classes overlap each other quite a bit. Perhaps consolidating or streamlining some of those. Although all of the instructors are wonderful, [name removed] is by far my favorite. She offers so much good advice and challenges us to really think outside of the box. I enjoyed Institute as a whole again this year. I was not impressed with the accomodations. I was not impressed with the food. Monday's lunch was awful! The best meal served was the box lunches! I was extremely impressed with the Institute team. Everyone makes us feel as if we are all part a big family. The smiles, the waves and the helpfulness makes those of us like me feel much more at ease. Thank you to the Institute team for making the week fun and informative in a fantastic learning environment.
- [Name removed] was the best class adviser EVER! I didn't miss the opening ceremony/ice breaker b/c I was 4th year but I would suggest it for those 1st-3rd year to set the tone for the week and introduce the BOR and Institute Staff.
- The 45 ideas in 45 minutes is such a useful and beneficial class, I feel it needs to be required.
 - It would be nice to have time scheduled with our classmates to share, brainstorm, bond, etc. The class dinners are nice, but with the classes being so large its hard to go out all together multiple nights.
 - See if the instructors will conclude the class 10 minutes early which gives everyone time to complete the survey. Without time set aside to complete these, they will not be done. I did like having them on the app this year.
 - Even though I'm a 2nd year, I hated to hear the event for 1st year students was not set-up like it has been in the past. As a class, we were told we had to sing together as a group which help us bond and get to know each other right off the bat. It was also nice when the other classes came in to join us after our 1st year section was over. This should be used as a time to get together before classes start the next day.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- It was a great learning experience. It by far exceeded my expectations. I was concerned that it wouldn't be beneficial or would be just another conference that I attended. It was not and I would highly recommend it. The networking itself was invaluable.
- I had a wonderful experience and learned so much great information. My only bad experience was in a couple of my elective classes. They did not meet my expectation.
- I am sure you will hear several comments about the food. The lunches were not ideal. However, the dinner at the Big Bash was great. My class advisor really made sure we knew all announcements. I was told other class advisors didn't do that. Maybe next year ensure all class advisors know what information to give everyone. If the bar at The Big Bash isn't going to be open until 7:20pm, please inform the hotel so that they are appropriately staffed at the hotel bar before graduation. They only had one bartender working trying to serve everyone. I know this is out of your control, but I would like to hope that the hotel would have additional staff if they are aware that people will be buying drinks. In all, Institute was great! Thank you for all of your hard work!
- Lunch could use some work. The sausage pasta was too heavy, and from my conversations, did not go over very well. Last year was enchiladas, and that wasn't good either.
- Something felt lackluster this year compared to last. Maybe it was the lack of social components to the events.
- I felt there wasn't a lot of interaction with the other class on the first night to welcome them. As a 4th year, we didn't need it as much. It may be helpful to everyone to bring back something small on opening night. Dinner at graduation was much better. Have more (different) classroom teachers. I felt that I had several of the same ones of the 4 years. (Once you have had them once or twice, it's the same stuff they are teaching in class.)
- I loved the content and the notes on our door each day were amazing.
- Lighter options for lunch. Heard several complaints about the sausage pasta. The Georgia BBQ lunch was good but everybody returns to class feeling miserable. Return to reserving tables by class for the Big Bash.
- Wonderful and exclusive learning opportunity. The elective courses were great. The length of the elective courses was too short. There was not enough time to dig into the content.
- Institute is one of the best experiences I have ever had. The advisors and other staff are truly amazing. The class times is invaluable even throughout the year they continue to support you and answer any question you might have. They truly stand behind what they say about helping you in anyway. This has truly made a difference in my career. I have made life long friends and built relationships that will last forever. Any Chamber or Association that does not send their staff is not just depriving their staff of a wonderful education but depriving their organization of all the knowledge and expertise offered through institute. That doesn't include all the relationship and knowledge from other Chambers. Thank you institute for helping me to be a better professional.
- Some of the lunch choices were questionable. Dinner at the Big Bash was very good. The shuttle available at the hotel to go to the downtown area was great & much appreciated.
- The Institute program is awesome! All of my teachers/speakers were very well versed and I feel my take away was priceless.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I was highly disappointed to see all receptions had been canceled. While the classes are beneficial, the true value of this program is the relationships made with other professionals. The various receptions allowed a set time to mingle, and I think it was a great disservice to not provide this (particularly to first years). I would also HIGHLY recommend lighter, simpler lunches. No one wants to sit in a class for 6 hours after eating pasta. Soup/salad/sandwich would more than suffice.
- Great classes with great information to take home and use. We loved our class advisor [name removed] and would love to keep her next year.
- Didn't really understand the lack of the opening reception or not having a cocktail time before the graduation. Bar at UGA is too small to accommodate group so cocktails helps.
- 1) I would recommend the 4th year electives be different, maybe a higher level. I felt like I had taken most of the relevant courses by this time, and were taught by a different instructor.
2) the 501C3 class taught by [name removed] was very informative and should be a 4-hour class, 2 hours barely scratches the surface. Or maybe have a part 1 and part 2 elective if you need to keep them at a 2-hour block.
2a) maybe add an elective or bonus session for information on Accreditation, CAE or CCE.
3) the lunch food isn't great, I said it last year as well. Would there be a way to include a hot breakfast buffet as opposed to hot lunches everyday? The food at graduation was the best it has been in a few years, thank you for that.
4) I think we really missed the Orientation done in the master's hall after homeroom, make it part of the day. I understand it's a travel day for most, but I think it's important for each class to see everyone in that venue. It's a chance for people to put faces with names when you used to introduce them. I'm not a big fan of the after-reception, for everyone. Just the 1st year is key.
5) I think the Monday 10-hour days is too long with class dinners that night. I would recommend the shorter days when we have class dinners. People are worn out by the 4 pm class that day not engaged.
6) on graduation night we had photos made prior to the event as class 4-1 and unfortunately 2 of our class mates missed the photo, when we approached staff to retake the photo with the step and repeat on the stage, we were denied the opportunity to do so. So we went outside after our own graduation and when we came in other classes were taking photos in front of it.
7) I would recommend that hotel staff serve the graduating class first before anyone else. We had one table that didn't get their entrees until the very end. Overall, it was a great experience and would love to come back and help out as an advisor or join the board when the opportunity presents itself. Just a few tweaks would improve the learning experience.
- Our advisor, [name removed], was the best. She helped in every way possible.
- The instructors were top notch and the information provided was valuable. It was very well organized. Slight observation that the bar opened late on the night of the dinner and drink tickets were not valid for drinks, just beer/wine. I am looking forward to coming back. Thank you for all the hard work in putting the conference on!

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Institute is the best professional development in the chamber industry, it is always so fulfilling, mind opening and fun! This year's SE institute was a little different, and that's okay, but I really missed having the opening night events -- maybe not the dinner and the karaoke -- but the part where all attendees were welcomed in a room together, classes were introduced along with advisers and the board of regents, really missed that official 'welcome to (back to) institute' moment. Only other item, and it's a personal preference, the night of the big bash the bar didn't open until after graduation, really missed being able to arrive a little early and network during a 'cocktail/social hour' setting. Overall, great experience, will be back next year, SE Institute is and always will be the BEST site!
- Box lunch needs to be scratched -- need to have regular meal. Great program content and great teachers.
- I love this program and I am so thankful for it! But, a big draw of Institute is the networking with other chamber and association professionals. Yes, some of that happens during class breaks, but most people are doing professional consultations, making work calls, or quickly getting food/drinks. The best networking happened at the receptions, and I was sad to see those opportunities removed from the schedule this year. When you don't create a place for all attendees to convene together, they will splinter off and miss the chance to connect. It just felt like a miss.
- The first session on Monday was a great way to start the week. It was an upbeat, interactive session that made the class bond immediately. I would highly recommend this type of session in the future for all levels.
- I'm totally fine if you don't feed us on Sunday night, but don't make us come for one hour home room class and that's it. At least bring back the pep rally to make it worth getting ourselves there. And then we can do our mandatory class dinner on Sunday! I went to a couple classes where there weren't enough chairs?? Anything we can do to keep people from typing like crazy people on their laptops during sessions? They're clearly answering email and not taking notes and it's extremely distracting. i wish there was an opportunity or class where each person just talks about one issue they need help with and the class weighs in with suggestions. could even be timed per person. 3 minutes per person or something. i know we're supposed to maybe be doing this during breaks and networking but that's really just not feasible. it could even be a homeroom exercise. i also wish there was a class about running leadership programs. or is that 4th year? any way to start class at 9? and just keep us late? i still feel like all my advisors have not been clear on what their role is or what they should be doing. obviously some get it and are superstars (because i've peeked in some rooms and have been jealous) but maybe some more direct instruction? overexplain what they should be doing. for the third year, i've had no decoration, no snacks, no excitement and just no help from them. ours this year was even rude to the speakers. but maybe i just got the bad apples? so the banquet food is bad. this is no surprise to you. so i'm not going to harp on it. i'm just thinking there has to be some sort of solution? maybe just a hot sandwich and a potato? or just do box lunches all days? or tell the hotel they're going to have to let you bring in food one day because of the complaints? i know this event is a beast and you're going to have some crazies on here. so hang in there.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- There needs to more classes or at least elective that deal specifically with Associations versus Chambers.
- This was a phenomenal experience. I can't wait for next year!
- Disappointed by the removal of the structured networking activities. I think the kickoff is beneficial as it introduces the Board, Chamber staff, etc. And you get a general sense of who all is at Institute. I have had a general issue with the food provided. And it got me thinking as well...I went to Northeast my first year and got breakfast and lunch most every day and I think a reception or two. At Southeast, esp this year, you hardly got any of that and for what I recall I am paying the same. Maybe consider doing a dining plan option or something. Would be happy to explore/brainstorm on this. 2018 seemed to have slightly more focus towards association which was nice to see. And I realize that southeast is more chamber focused if I wanted association I could have spent all my time at northeast. And not to complain, Monday is a very very long day going 8-6:15! I think the schedule could still be tweaked! Possible to have more involvement from the 4th year class into the Big Bash ceremony? ? ? Would have loved to hear more about beyond Institute and 4th year. You are given a paper to volunteer but its not really explained well -- the roles, functions, time commitments. Hard to volunteer when you don't know a lot about it (I did though!). To end positive, love the ice cream snacks with the hot weather.
- Too many cuts. Bring back sponsors. They were interesting and helped provide revenue. Now everyone is wondering where the money goes. By eliminating sponsors and trying to make up that revenue without increasing tuition, you cut too many networking opportunities. We had no chance to interact with the other section of our class or other classes until graduation. At that point, we weren't interested. It was our last night together. Bring back The Foundary. Just rent the place out and let everyone pay for their own drinks/ food. Have better food for lunch. A boxed lunch is fine or better yet, let us go out in Athens for lunch. The food was so bad at lunch on day 1 that almost nobody ate it. Our instructor invited herself to go with us when we went to a fast food restaurant rather than eat lunch in the cafeteria after that. Bring back champagne for all for a toast ... or don't say "raise your glass for a toast." Most of us just had water. The bar hadn't even opened. Toasting with water is not a celebration. The shuttle on the last night left early or didn't come. It said 10:45 on the schedule. We arrived right at 10:45 and there was no shuttle. Apparently you have to find your own ride to the Marriot if you stay for the entire dance after graduation. Bring back water bottles. We'll drink less bottled water (which saves money and the environment.) Make sure instructors teaching an elective have a separate presentation for the elective than a core they also teach. Otherwise, we hear the same presentation twice and learn nothing new. This happens often. (Kudos to [name removed]. His presentations were different.) Have instructors find out who we are/ size of our Chamber type info by survey AHEAD of the class. By day 3, it gets ridiculous. In one class, the lady spent an hour going around the room to hear this info and our communication issues. Not helpful. Then we spent 30 minutes in small groups to answer four of the issues. I felt like she just didn't want to actually teach anything. Overall, I love the IOM. Some of the classes are WAY to basic, but I know you have to make sure everyone knows the basics.

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SOUTHEAST

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I missed the welcome night with all the classes in the room and a chance to meet/see the staff and board as a kick off. I really liked the format of going long the first day down to short the last day. By the last day generally my mind is so fried I can't wait to leave. This year getting through one class on Thursday was really good, plus there didn't seem to be a rush to get out the door to leave. I felt this year there was less demanding / pressure from the staff and board about being on time and that is a good thing as I stated last year it felt very over the top in the making sure we were on time to class. I understand the need to be in the class but this year was a much higher feeling of being an adult and not treated like a kid. All in all I enjoyed this year probably the best of the three years I have been to Institute.
- I thoroughly enjoyed my advisor [name removed], class, and the speakers. All were very knowledgeable in their fields and were open to answering any questions. In the environment with having 1st years - 4th years, you get the vibe of being a Freshman in High School. I would recommend that the 4th year students also helped greet in the mornings while attendees are making their way to their classes. This would allow for more networking and would possibly bridge the gap between class years.
- Institute has been a wonderful experience which I will cherish for the rest of my life. Kudos to the leadership for having the courage to change in the schedule/programming (ie. 1st night).
- Content of the classroom instruction met or exceeded my expectations as it has every year. Staff and Board members do a good job of making sure we have great content in the classroom. I was disappointed that practically every opportunity to interact with people from other classes was removed from this year's schedule. No opening reception, no reception prior to The Big Bash. I very much enjoy the bond my class has with each other, but I would also like to have opportunities to interact with others outside my immediate class reinstated next year. These networking opportunities were an important part of my IOM experience the first two years, and I think our first year participants this year really missed out on this aspect of the IOM experience. I was also disappointed by the quality of the food served at lunch (aside from the box lunch, which was good). Many in my class chose not to eat lunch the other days.
- It would have been nice to offer complimentary parking passes to those students staying off site. I had a rental car and had to pay \$10 each day to park. I also had others carpool with me each day from different hotels so they wouldn't have to pay to park.
- I noticed some big schedule changes this year and I want to recognize that you do take this feedback seriously! I was happy to see that we didn't have a kickoff event, but I would have liked to have seen a more structured reception for the first years. Monday's lunch was a big miss and not a hit. (But, I did like that it was a seated presentation...although for the future, a nice buffet would have worked better for me.) I didn't like that state pictures were taken during the class day. I really like having the US Chamber step-and-repeat and good lighting of The Big Bash. I also didn't care for the bar opening later after graduation. I felt some of the decisions (no orientation/kick off event, no opening reception) led to a cost savings that wasn't shared with attendees. Thank you for your consideration and for your hard work on this successful event!

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- The first day of classes was intense, especially for a 1st year. It would have been easier to process all the information on Governance, Finance, and Human Resources if it would have been spread out a little more.
- I really missed the Sunday meeting to kick off Institute. I don't think there needs to be a reception or anything, but just a gathering of everyone in attendance to get all of the energy and excitement on the first day together. All attendees were not all officially together until graduation and it just felt like there are no official beginning. With that being said, I was very thankful to not have "forced" activities such as the Sunday night reception and the karaoke activity. I really loved the app but forgot to do some of the evaluations. We did not get reminded of that enough. Institute has been the most amazing experience. I'm sad to see my time end. Thank you for an amazing final year!
- I truly enjoyed my first year attending institute. My only recommendation is that for a first year it was difficult to make it through our first full day (long day at that) with both a finance class and governance class. I would recommend splitting those for first year's in the future.
- I missed having the welcome reception. Two years ago when it was off site it was a lot of fun and really brought our class together.
- Although Southeast Institute was a great learning experience, I was disappointed that the networking opportunities provided in past years were cut from this year's agenda. Here are some opportunities for improvement:
 1. Bring back the opening reception welcoming the first year attendees. As third years we wanted them to feel welcomed and get to know them.
 2. Karaoke night at the Foundry. This was great cross-class networking. The event doesn't necessarily have to be karaoke but some type of evening networking event would be nice to bring back.
 3. The pasta lunch was awful. I would prefer boxed or offering a list of restaurants (local chamber members) we can visit and possibly extending lunch 15 minutes so we can give them some business.
 4. Big Bash pre-reception—let the drink tickets count for hard liquor as well as beer or wine.
 5. Please consider not breaking down the Big Bash (step & repeat on stage) before the party is over. We would never do that at one of our Chamber dinners.Looking forward to a great week next summer! Thank you for all that IOM staff, board of regents and advisors do.
- The first year reception in lieu of a full kickoff reception was held in a strange location, the Savannah Room. It did not seem as if the hotel was prepared for it as the temperature was uncomfortably high in the room, the room was not large enough to accommodate everyone, and the bar did not seem adequately staffed for the number of attendees. Would love to have had a reception in a larger area providing an opportunity to get to know attendees, faculty, and volunteers in a relaxed environment.

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SOUTHEAST

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- This was an eye-opening and wonderful week! I love the members of my class and really appreciated the experience of the instructors. I felt very comfortable asking questions throughout the week and everyone I met was very accommodating. I know this took a lot of planning, so thank you to everyone who worked so hard behind the scenes! I can't wait for next year!
- I found the Board to be very helpful in a Chamber issue that came up while I was in Institute. Their advice and guidance was very helpful. I was able to meet with an attorney on Friday as the Board suggested.
- IOM is wonderful and the staff and speakers are spot on. Big Bash dinner was a little unorganized. Communication about start time and the actual festivities were not as good as last year. The lunch on Monday was a poor choice as well. Other than that, the overall IOM experience is excellent!
- The ice-breaker event for Sunday was greatly missed, no introduction of Staff or Regents. As a 4th Year, I recognized some, but I can only imagine what 1st year felt. Even if NO Food or Drinks are offered, a gathering or orientation should be brought back.
- Outstanding experience. IOM instructors, advisers, and staff were helpful, knowledgeable and friendly. Looking forward to returning.
- It seemed as if the graduating classes were being hurried through the final year in order to move on to the next class. We were not provided with the receptions of previous classes and 4 of our class were not served dinner until almost an hour after everyone else. I would hope that future 4th year classes are better celebrated for their years of investment in the program. I did thoroughly enjoy the classes and advisors throughout my Institute experience.
- I just want to say thank you to everyone that had a part in making this possible for us professionals to further our education and everyone was so kind and thoughtful. Please continue to offer this to Chambers and Associations because it's a great experience. Again thank you so much for what each and everyone of you did to help further my knowledge in the Chamber world and I look forward to applying the many things I learned over the four years at Institute!
- The program and process is amazing! The instructors are top notch. Love and appreciate the snacks in between. Few suggestions:
 1. I missed everyone getting together in the auditorium on Sunday night. The class roll call is fun.
 2. Serve the 4th years first at the Big Bash. Several in our class got missed.
 3. Allow group pics at back drop on stage. This is great PR for the US Chamber / IOM. We were told we couldn't and then others did anyway.
- I really think the meeting/kickoff (where all the classes were introduced) at the beginning should be brought back. That created high energy within the groups and was greatly missed. The food at the graduation was fantastic, and so much better than last year. The boxed lunches have always been great. I honestly could have eaten the boxed lunch more than one day. The pasta lunch served by the hotel was too heavy and not very good. Something lighter, or another boxed lunch, would have been better. I would also recommend not having class dinner on the same night that we had classes until 6:00 pm. It made for a very long day. However, I did like how you moved that extra class from the last day to Monday. That helped us leave earlier, which was great.

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



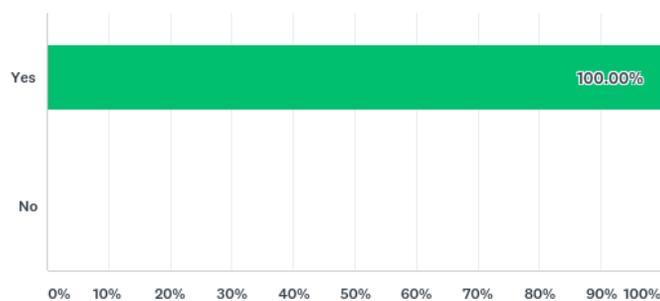
SOUTHEAST

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I really enjoyed Institute overall! I did feel some aspects were a bit too "summer camp" for the program, I was excited for really in-depth learning and information, and some of the faculty really focused on the "warm fuzzy bonding". The communications teacher that I had, [name removed] (and reviewed) seemed completely unprepared to teach both the elective and core class. She spent almost all of our time talking about herself, and then having everyone in the class introduce themselves, there was no substance at all. I was really looking forward to the communications courses so this was really disappointing. The banquet food service at UGA was the worst I've ever had. The boxed lunch was much better than any of the hot meals they served. Overall I really enjoyed my first year and can't wait to return next year!
- Best program I have been a part of. I was in sales for many years and went to many training programs. This by far is the best training I have received in any professional setting. As a 4 year, I hate to see it end. The tools, contacts, friends, and knowledge gained is immeasurable.
- I was very impressed with Institute as a 1st year participant. The courses and teaching staff were all fun and informative. The only negative I could say about the whole week was the prepared lunches by the hotel. Not very satisfying or good in flavor. Having said that I still thoroughly enjoyed my time and excited to travel to Athens next year.
- Great people and tremendous information to bring back to my Chamber! Can't wait for next year!
- The sessions were mostly informative but I do feel there could be more rigor to the subject matter.

Q17 Did you leave Institute with at least three or more ideas / takeaways to bring back to your organization?



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



2018 BOARD OF REGENTS ROSTER

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: 2017-2018

PAST CHAIR

Kelle Marsalis, IOM, CCE

Vice President, Strategic Initiatives
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Term: 2017-2018

Jason E. Camis, IOM

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913-856-6464
jason@gardneredgerton.org
Term: 2015-2019

Ryan Evans, IOM

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801-930-0346
revans@utsolar.org
Term: 2016-2018

VICE CHAIR

Tony Felker, IOM, CCE

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tfelker@friscochamber.com
Term: 2017-2018

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Term: 2017-2019

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Term: 2017-2019

Lisa Hermes, IOM, CCE

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lhermes@mckinneychamber.com
Term: 2015-2019



2018 BOARD OF REGENTS ROSTER

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Term: 2016-2018

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Term: 2015-2019

Thane Phelan, IOM

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Term: 2017-2019

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Term: 2016-2018

Gene Terry, IOM, CAE

Executive Director, American Society of Hand
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856-380-6840
gterry@ahint.com
Term: 2016-2018



AGENDA

OCTOBER 5, 2018

10:15 A.M. – 12:00 P.M. EDT

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

- | | | |
|------|--|-------------------------------|
| I. | Welcome and Introductions | Brad Lacy, IOM, CCE |
| II. | Approval of Minutes | Brad Lacy, IOM, CCE |
| III. | Nominating Committee Report | Tony Felker, IOM, CCE |
| IV. | Analysis of 2018 West Institute | Board Members/Institute Staff |
| | A. Final Enrollment Report | |
| | B. Survey Results and Discussion of Institute Week | |
| V. | 2019 West Institute | Tony Felker, IOM, CCE |
| | A. Create 2-3 Strategic Goals | |
| | B. Discussion of Week/Assign Regent Responsibilities | |
| | • ACCE Conflict | |
| VI. | Institute Staff Update | Institute Staff |
| | A. Program Updates and Looking Ahead | |
| VII. | Other Business/Adjournment | Brad Lacy, IOM, CCE |

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

MINUTES

JULY 8, 2018

11:30 AM PDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

In attendance: Brad Lacy, IOM, CCE; Tony Felker, IOM, CCE; Kelle Marsalis, IOM, CCE; Juliet Abdel, IOM; Ryan Evans, IOM; Lisa Hermes, IOM; Robert Newman, IOM, CAE; Thane Phelan, IOM; Jennifer Reiser, IOM; Gene Terry, IOM, CAE; Josh Bonner, IOM; Laura Grimes, IOM; Beth Journeay, IOM; Lisa Langer, IOM; Karyn K. MacRae, IOM, CAE, CMP; Caitlin C. Gayles; Katelynne G. Cox

I. Welcome and Introductions

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

II. Staff Updates and Week Overview

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.

III. Photos and Joint Lunch

Group photos were taken and attendees caught up over lunch.

IV. Class Advisor Responsibilities

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. Other Business and Class Advisor Adjournment

Additional Class Advisor business was discussed and then advisors were dismissed.

VI. Board of Regents Business

- Approval of minutes
 - The minutes from the May 21, 2018 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.

MINUTES

JULY 8, 2018

11:30 AM PDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

- Importance of fundraising
 - The group was reminded of the various ways to fundraise and that all funds raised on-site go directly into the West Regent Scholarship Fund.

- Additional business and adjournment
 - Any remaining business was discussed prior to adjourning the meeting.

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



2019 SCHEDULE OF ACTIVITIES

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

Sunday, July 14

11:30 a.m.–1:30 p.m. **Board of Regents & Class Advisor Briefing:** University Hall, 3999
2:30 p.m.–4:00 p.m. **Registration:** University Hall, East Atrium
2:00 p.m.–4:00 p.m. **LMU Housing Check-in:** Xavier Hall, Room 112
3:30 p.m.–4:00 p.m. **Tour:** University Hall East Atrium
3:30 p.m.–4:00 p.m. **Graduation Rehearsal** (*4th year participants*): University Hall, Auditorium
4:00 p.m.–4:45 p.m. **Homeroom:** University Hall, Individual Classrooms
5:00 p.m.–5:30 p.m. **Institute Kickoff:** University Hall

Monday, July 15

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:** University Hall, East Atrium
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 16

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
11:00 a.m.–11:30 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.*)
2:00 p.m.–2:30 p.m. **Class Advisor Meeting:** Faculty/Regent Office, University Hall
Evening **Class Dinner Option**

Wednesday, July 17

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:** University Hall East Atrium
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.–9:30 p.m. **Graduation Ceremony and Big Bash:** TBD

Thursday, July 18

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. **2019 West Institute Concludes**



WEST

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

2019 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

Class Advisors

Ryan Evans

Silent Auction/Fundraising

1. _____

2. _____

3. _____

4. _____

Industry Consultations

1. _____

2. _____

Scholarships

1. _____

2. _____

3. _____

4. _____

Opening Welcome

1. _____

2. _____

3. _____

Big Bash

1. _____

2. _____

3. _____

Volunteer/Faculty/Staff Dinner

1. _____

Lunch Roundtable Discussions

1. _____

2. _____

Metro Chamber Marketing Strategy

1. _____

2. _____

State Photos (Optional)

1. _____

2. _____

Social Media Strategy (Optional)

1. _____

2. _____



WEST

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

GEOGRAPHIC BREAKDOWN

2018 West Institute

97 Attendees from 27 states and the District of Columbia

State, Number of Attendees, %

Alaska, 1,	1.03%	Missouri, 2,	2.06%
Arkansas, 11,	11.34%	Montana, 1,	1.03%
Arizona, 1,	1.03%	North Carolina, 1,	1.03%
California, 19,	19.59%	Nevada, 1,	1.03%
Colorado, 2,	2.06%	Oklahoma, 2,	2.06%
District of Columbia, 4,	4.12%	South Carolina, 1,	1.03%
Florida, 1,	1.03%	Oregon, 4,	4.12%
Illinois, 2,	2.06%	South Dakota, 1,	1.03%
Indiana, 1,	1.03%	Tennessee, 1,	1.03%
Iowa, 5,	5.15%	Texas, 23,	23.71%
Kansas, 2,	2.06%	Virginia, 1,	1.03%
Kentucky, 2,	2.06%	Washington, 2,	2.06%
Louisiana, 2,	2.06%	Wisconsin, 1,	1.03%
Maryland, 1,	1.03%	Wyoming, 2,	2.06%

Top Increases Since 2017:

Arkansas +2

Louisiana +2

Most Attendees in 2017, Texas with 28

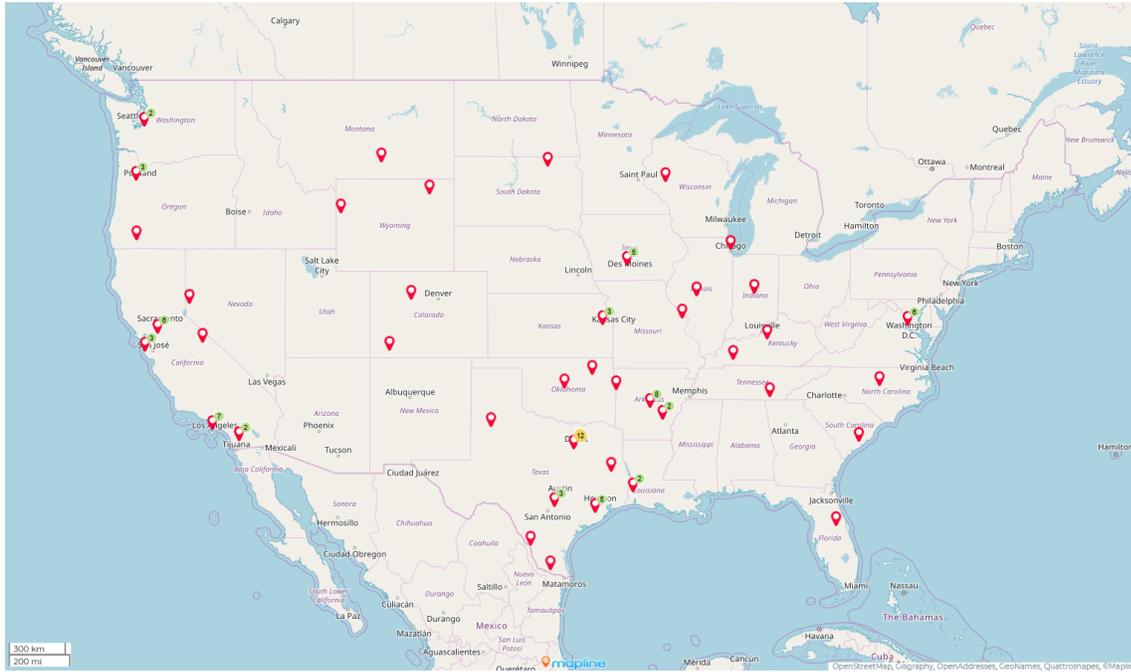
Most Attendees in 2018, Texas with 23



WEST

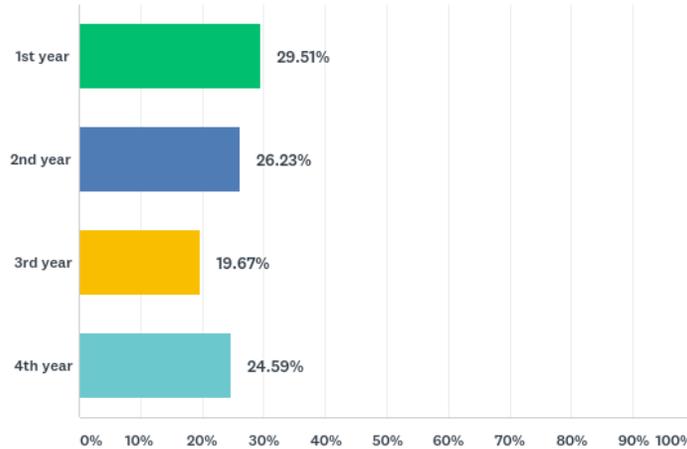
U.S. CHAMBER OF COMMERCE FOUNDATION
Institute for Organization Management

GEOGRAPHIC BREAKDOWN

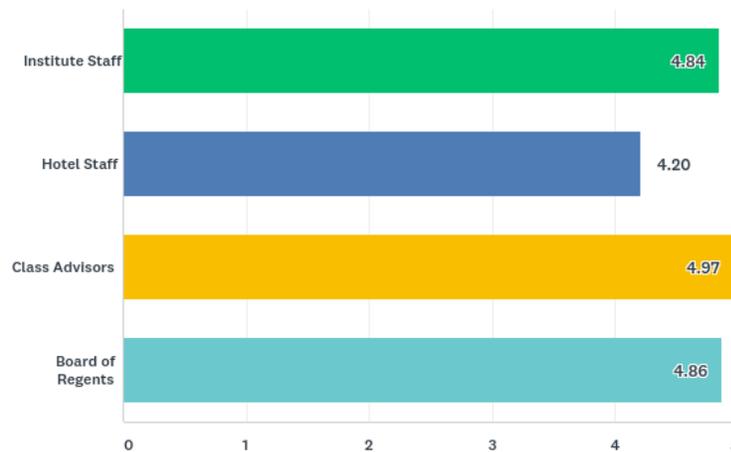


ATTENDEE SURVEY RESULTS AND FEEDBACK

Q1 Your class level:



Q2 Customer Service (with 1 being poor and 5 being excellent):



Additional comments about customer service*:

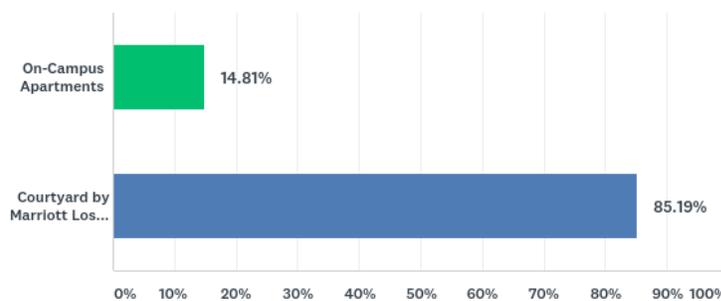
- Because we had no gathering with the entire group, it was hard to get to know Regents and IOM staff. It was just who you happened to interact with in the course of your sessions.
- I was locked out of my room (and nearly locked inside my room) because of a malfunctioning door. After making me wait for over an hour, they finally moved me to a new room. I was not provided anything additional accommodations for the inconvenience. They also seemed to dismiss my comments that this issue was happening with multiple people in the hotel.

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Great morning customer service at the hotel. I love the Institute, Class Advisors and Board of Regents and the light they shine.
- The hotel options are terrible. The regents, and class advisory where awesome! I would pay more for a better hotel.
- This is one of the most well put together conferences I have ever been too.
- Everyone was very attentive and available to help.
- Check-in at the hotel on Sunday was a bit of a nightmare. Several didn't get checked in until way after the 4pm check-in time, which was inconvenient with Institute activities going on.
- Everyone was welcoming and provided good service.
- Had a great time and all staff was very helpful.
- Institute is great, but the hotel experience was lacking.
- Everyone was just really nice. Especially [name removed].
- The Board of Regents and Class Advisors are phenomenal every year. [Name removed] was amazing!
- Institute / Board of regents weren't rude, I just did not have a lot of interaction with them.
- Staff were friendly and helpful during Insititute. However, the decision to not serve drinks at our graduation until late really made a poor impression on the graduates and their guests. It made things very awkward. We are not children. They could have changed course and chose not to. I run events - you always have an option to improve customer service better when people are very clearly unhappy.
- I didn't feel the majority of Institute staff was exceptionally friendly or outgoing.
- I know some did not care for hotel staff, but they responded very well to customers that were considerate.
- Everyone was honestly very helpful and energetic the whole time.

Q4 Which hotel did you stay at?

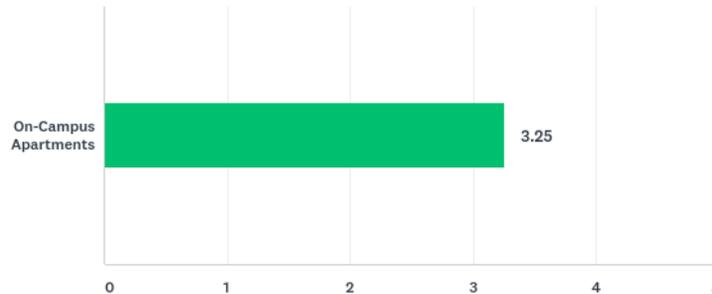


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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q5 If you stayed at the On-Campus Apartments, how would you rate your accommodations?



Additional comments about accommodations*:

- For campus dorms, they are fine.
- Accommodations were affordable and comfortable. I liked having the restaurant onsite in case I didn't want to go out.
- The campus was beautiful and the room was exactly what I would expect from a college dorm. The only issue I had was with the heat in the room. The outside temperature was way above average and all the stores sold out of fans. This was something that was out of the control of the Institute staff and I never complained to anyone. Next year I will definitely have one mailed to the campus in advance. Thanks for all that you all do!
- Our hotel was great!
- Accommodations are nothing fancy but were comfortable this year. Bringing your own pillow helps a lot.
- Weather plays a big role at night, be very manageable with a fan. Not crazy about the disposal sheets (horrible) room very neat and clean.
- I heard they were pretty rough.
- Charging \$23 to supply those "sheets" is not okay. My roommate and I went to Target to buy sheets after already paying that amount. Those are not sheets, they were like tissue paper. Really not cool.
- The hotel staff was so nice and quick to accommodate!

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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q7 If you stayed at the Courtyard by Marriott Los Angeles Westside, how would you rate your accommodations?



Additional comments about accommodations*:

- I liked the Marriot's location and amenities a lot better than the hotel in 2017.
- The quality of the hotel accommodations was underwhelming (e.g. size of inside restaurant/bar, lack of poolside seating/bar, sorry smell in room, malfunctioning doors).
- Good location in terms of shopping mall access.
- Restaurant/bar not open enough hours to accommodate us.
- I want a hotel that has room service and food that you can order at all hours. Also guaranteed early check in.
- The area was more of the concern then the actual hotel. There are options closer to the Marina that are essentially the same distance.
- The room was nice, clean and quiet. Loved the infused water in the lobby every day. Check-in needed some help.
- Staff at the hotel were great but the restaurant/bar was lacking and the location was not the best for finding other things nearby.
- It was clean and comfortable.
- Unfortunately, I think I had about 15 hours of sleep the entire time at Institute, the beds were horrible and the AC was blaring. I did already hear that we will be at a different hotel next year so thank you!
- Old, outdated, no room service, no lunch served in hotel to accommodate family attending with attendees.
- I know some people had issues with check-in and rooms not being ready, but I did not have that issue and the staff was great!
- Breakfast was expensive and no shuttle to the airport.

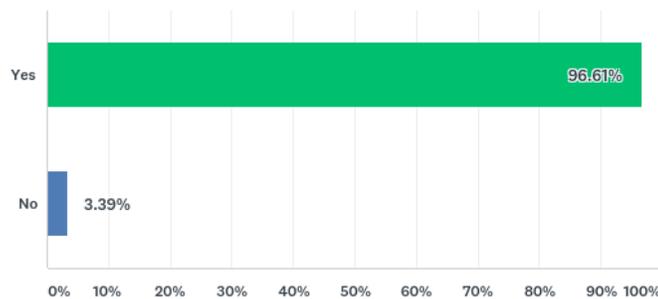
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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Lied to about the rooms and check in. Some people they let check in others had to wait, same with late check out, depending on who answered the phone the answer varied. The room was nice and clean, but my door was always stuck, having to call the front desk to even get out of my room. Said they would fix but never did.
- At the previous hotel I was able to check-in as soon as I arrived (approx. 11 a.m.) the past two years. This year I had to wait a couple of hours. I also missed the shuttle.
- I didn't love the location (not much in walking distance) but not bad. Room and facility was great.
- Really frustrating check-in process plus received email a lower rate was available than what was offered through Marriott rewards and hotel staff wouldn't honor the lower available rate.
- Had to go downstairs every day because my key wouldn't work. I heard the same thing from several others. When there is little time between events it's really a problem.
- Accommodations were fine. Prefer having room service like at 4 Points Sheraton.
- Very limited hours for food service and very limited food choices. Great location as far as walking distance to things.
- Liked the previous hotel better-and it was closer.
- Mediocre place. Lacking amenities and limited food service availability.
- The hotel staff was amazing and so was the nice man who was there to direct us for our transportation everyday. They made it super easy!

Q9 Did you download the 2018 West Institute App?

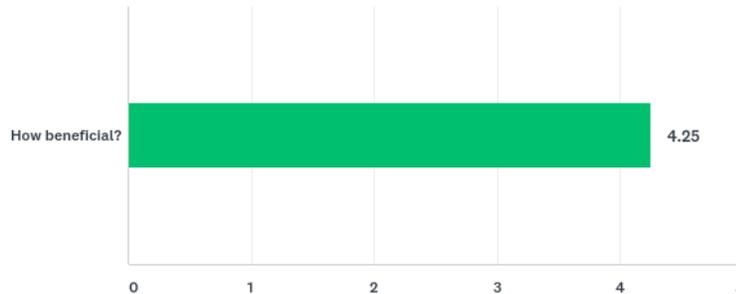


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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q10 If you downloaded the app, how beneficial was it?



Additional comments about the 2018 West Institute App*:

- The app was very helpful and kept me from having to print out and carry lots of papers.
- I only used the app for instructor reviews. The class list that came with the badge has all the info I needed.
- It was great and easy to use.
- I used it often. The presentations where not easy to access on the app.
- Loved the app!
- Nice tool to refer to for a variety of aspects of the program.
- It was convenient to have my schedule on the app. I also appreciated the ability to take course surveys on the app and download course handouts and other resources. I did not like having to log in to the app with my email address every time I used it. A "remember me" option would be nice. If we could connect the silent auction app with this one, that would be even more convenient.
- It was only helpfully me in looking at my schedule.
- Easy to access and use.
- Very convenient to use and nice to always have the information with you. Some of the handouts were not able to be seen through the app, but minor complication.
- It would be better if I didn't have to log in every time I went to use it.
- I rarely used the app after I downloaded it.
- Not only was it helpful, but I felt it was essential. There were so few handouts and no note pads provided so taking notes was tricky. Maybe advise students to print the handouts in advance or send a reminder for us to bring our own notepads/pens. Maybe you did and I just missed that part, though!
- The app was very helpful for the entire duration.

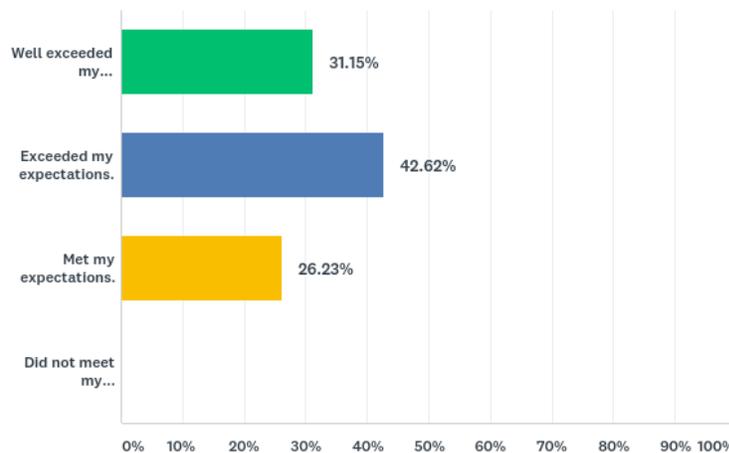
*ATTENDEE COMMENTS ARE LISTED AS WRITTEN BY THE ATTENDEE AND NOT EDITED FOR GRAMMAR.



ATTENDEE SURVEY RESULTS AND FEEDBACK

- I hate to diss using less paper, but I kept forgetting to do the class evaluations because I had to log in and do them. I also didn't write as many long comments because I don't like typing on my phone. In fact I think I forgot to review [name removed] on the 2nd to last day - SHE WAS AMAZING! Bring her back forever!
- The app was glitchy. I had to re-login every time I used it, our class couldn't get a group message going in the messaging section. I tried to use the app the first day, but ultimately I ended up not using it at all.
- [Name removed] is a nice guy and knows a lot about Facebook but he should not be teaching strategic technology solutions or integrating data classes. Those classes should be focused on marketing automation, AI and big data solutions and how they pertain to orgs of different sizes. [Name removed] and [name removed] are amazing teachers. They connected some dots for me that have inspired solutions to some of the challenges I face at my Chamber. Serve drinks at Graduation. Thank you for all the hard work organizing this program. It is no small feat. I hope to come back in some capacity.
- I would like to see silent auction on the app.
- Only used to give class evals and look at bus schedule.
- Very easy to get info needed fast.
- I mostly used it for my room numbers and the bus times.
- I used my paper schedule more but liked the ease of instructor surveys on the app.

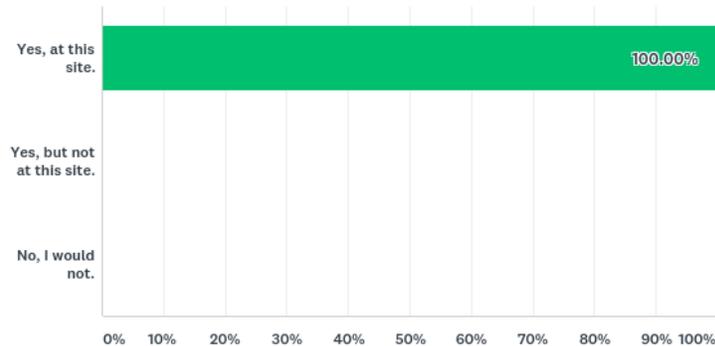
Q12 Overall, to what extent did Institute meet your expectations?



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

ATTENDEE SURVEY RESULTS AND FEEDBACK

Q13 Would you recommend Institute to other nonprofit professionals?



Additional general comments or suggestions about Institute*:

- I received a scholarship one year and not this year. It felt weird because my colleague received one and we had both received a partial scholarship the previous year. With the West Institute's huge success in fundraising, it made me wonder why I did not qualify this year. In fact, over the year our Chamber received our 5 Star, I was promoted to VP and received an ACCE Lifetime Award, so it would seem that I certainly was putting IOM knowledge into action. I am not upset at all, it was just not clear from the start what the difference was from year one to year two that contributed to me not receiving a scholarship.
- While I loved my first year at Institute, year two was even better. I loved every one of my classes and it was great having built relationships with my classmates.
- 1) Wide range in quality of classes. The good ones were great and a couple were pretty bad.
2) Food at the yacht club was once again disappointing. They forgot to put dressing on our salads, we had to go ask for some.
3) The Sunday evening reception was a nice thing, many of us were sorry to see it go. Great job overall -- can't wait for next year!
- As a 4th year, it was somewhat disappointing to not return to the yacht or have a kick-off party this year. The attempts to manage costs were noticeable, from the previously mentioned items to the Institute bag we received at check-in (which seemed like a plastic bag and only contained the binder). It is also extremely challenging for individuals who attend ACCE Annual Conference to attend West. As a 4th year who would want to return as a regent or adviser, it is very disappointing to hear that West 2019 dates now actually overlap with ACCE. My overall 4 years was a life-changing experience. I will be forever grateful. Thank you.
- As an introvert, it is a challenge to deal with the emphasis the institute puts on going to dinner with your classmates every night, taking photos, sharing on Facebook, etc. I never felt pressured to participate, just found the push to bond a bit unnecessary.
- Enjoy this program! Sad to see mixer off the agenda- especially for 1st year students.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- The lunch food needs to be better. The day that had the Asian Slaw and the Salmon was outstanding. No more deli meat and chips please. I think home room either isn't needed or should be held later in the day. Also I enjoyed the mixer/social that followed when we attended year 1. Other wise we are all trying to catch up at class instead of listening. I would like to use the large Marriott hotel that is nearby that would be a much better hotel to host us. I loved our class advisor Beth. She was amazing as was Laura our class 1 advisor. Those 2 are going to be hard to beat for year 3 :) THANK YOU for this opportunity and all of your hard work!
- Overall, I enjoyed Institute. All but one of my faculty where stellar and the class, regents and advisers where great! I will have three of my staff in the IOM in 2019.
- This conference was a game changer for me. I felt the curriculum was well thought out and extremely diverse. So often you hear the same things over and over at conferences, but West Insitute had so many unique subjects! It was worth every penny! Only one tiny thing I would change, the food at the conference may need a little work. Maybe outsourcing chamber members to cater would be a good idea and offer some variety. Thank you for all the hard work that your organization puts into this amazing Institute!
- Great program- thanks so much. Only item that our class did not like was the no drinks at the graduation....I would not do that next year.
- For first years, it would be beneficial to have a welcome party to folks can get to know one another prior to diving into classes. The organized class dinners were great, as was the graduation ceremony.
- I'm honored to have the opportunity to gain professional development through the Institute for Organizational Management. Over the years, I've learned from experts in their fields and made connections with my industry peers around the state and across the country, leaving me with a toolkit of resources to better serve our members and stay relevant in the field.
- 1) It would be nice to have a homeroom that was larger and had more comfortable/functional seating as well as more outlets. This was the most disappointing part of the experience.
2) There were several times I ended up sitting next to someone in an elective that would talk under their breath/talk out loud over the top of the presenter, making it difficult to hear the presenter. I realize this is not your fault, nor probably is there anything you can do about it except maybe post reminders in the front of the room behind the speaker to be respectful of the presenter while they're talking.
3) The same for participants pulling the speaker off into the weeds on a topic completely off track from the content that is being presented. Again, maybe just a reminder to be respectful of their time and content.
4) Please have more bartenders/a more adept bartender available at the yacht club. The line to get a cocktail was ridiculous.
5) Have participants turn in name badge lanyards on Thursday and recycle them to save money from having to buy new ones every year (we do this with Leadercast lanyards). Great job to all! West is best!

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



ATTENDEE SURVEY RESULTS AND FEEDBACK

- Overall, I had a great Institute experience and enjoyed attending West all four years. I didn't mind discontinuing the welcome reception on opening night, but it would have been nice to still meet as a West group in the auditorium following homeroom. I always thought that was a good orientation (or welcome back) for the week. I liked that the lunch location was moved to the same area as the breakfast snacks and break areas. Lunch however, was lacking. Having cold-cut sandwiches two days in a row was disappointing, and the Asian fusion meal was a little too ""creative"" for a group of our size. I think incorporating an alumni program would be great. I would like the opportunity to continue professional development through free or reduced-cost webinars for IOMs. Organized meetups at other Chamber events based on location or graduation year (ACCE Convention, for example) would be an added benefit as well. Having an IOM lapel pin would also be a nice touch for graduates. When choosing electives, it would have been beneficial to have access to past courses so we wouldn't repeat topics. I recall getting a transcript, but this is not available in the attendee center when registering to my knowledge. The graduation photos were well done and uploaded quickly!
- The West Institute was very organized and welcoming. Our class advisor was so helpful. I appreciated having course content prior to the class; I would suggest having a name, rather than just an image, with the document in the student portal, as well as having all documents available by the Friday prior to Institute starting. Mid-day snacks and drinks were a nice break. The boxed lunch was awful because the sandwich already had mayo on both sides and potato salad with mayo leaves little for someone who doesn't eat mayo much to eat (cookie and chips). Adding what chips were in the box would be good too. The networking and meeting people was one of the best and most useful parts of Institute. The instructors were engaging and passionate about their topics. It was a great first year experience and I look forward to attending my next three years. Thank you!
- I enjoyed my time at the institute especially with the networking opportunities.
- My class is heavily attended by chamber staff and so I felt much of the class time was geared towards chamber education. I tried my best to apply the information but I think that experience level may have something to do with it also. Possibly have advanced courses or have the instructor send surveys to gauge level of experience/ participation so that all levels can be engaged in the class. not all classes were like this, I especially enjoyed many of the marketing, legal, customer service geared classes!
- Being a 1st year there was a bit of familiarization curve. Flow was good. Low-key environment maintaining professional atmosphere.
- After attending my first two years at the Northeast location, I found my experience at West to be much more enjoyable. The lunch time round table discussions were fantastic, the smaller size was conducive to making strong connections, the transportation was well organized and managed, the regents were visible at all times and approachable, the encouragement of class spirit with shirts and such was fun - overall a fantastic experience!! I will recommend this location to anyone considering Institute.
- My first 2 years were at Villanova, made the transfer to just meet new people, love the atmosphere and people that were in my class (more chambers vs association) Loved my overall experience. Bring [name removed] our next Year!

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- So, I heard about budget cuts, but I think as a first year last year that this year's class might have missed out on the opening party. It did give us some more time to bond with our classmates. If you don't do a party I think it will still be beneficial to do an opening like you did last year in the auditorium. Even as a second year it kinda felt like it with homeroom on Sunday it was started and not easy into it. Don't think you have to have a party but an opening would be great!
- The Institute Program in an incredible experience. A couple things to note for this year: I felt this year that the food was disappointing. I missed the kickoff event, that was a great opportunity to meet some of the other attendees in other classes. There wasn't an opportunity to do that until Big Bash this year. I missed having a short day so we'd have a little time to sight see.
- Loved the entire experience. So great to have the interaction with other Chambers and Associations. Developing the bond within our class is great. The breakfast and break snacks could be improved and/or changed each day. I realize that the budget must always be considered, but there are so many other options that are just as cost effective. Also when staying at a hotel that does not provide a shuttle to and from the airport, it would be nice to have the Institute shuttle make a run to the airport, especially at the end of the week. I realize it would be difficult at the beginning, because of so many different flight times. But when a LARGE amount of us go to the airport directly after the last class, it would be a nice gesture and more convenient.
- My suggestions would include not having homeroom. I would have preferred to take a later flight rather than having to be there just to check in. My room aslo wasn't ready until about the same time that the homeroom started so it was kind of a mess on Sunday. I would also suggest having the class dinners on one of the shorter class days instead of at the end of the longest. Last suggestion would be to set aside some class time (even an hour or two) to just discuss issues some of us are having and get feedback from the group on ways to solve these issues. IOM was as always an exceptional experience. I learned a lot of valuable information, am currently working on implementing some of the things I learned. Thank you to everyone who put this together. It's a fantastic program.
- Monday was an extremely long day! Next year if we are not having an opening reception, I would suggest making that the class dinner night. I think some of my classmates were a little disappointed that we had to go to campus for just homeroom. Also, the food could be a little better, but I'm sure that's a budget issue. Other than that, I thought everything was great! Thank you to everyone who made it possible!
- It was really good and I was glad to be a part of it with associations as they are more corporate focused than Chambers. However, I did feel that alot of it was pretty 'basic' for 3rd year. One of the classes we just talked about challenging situations and although that was good, not sure so much time should have been spent on that. Several of the topics/group actions were redundant to previous classes, although they were good, again just thinking how to make best use of time. Maybe more about operational items by year 3, like creating an actual budget with a team, analyzing bylaws, etc.
- Overall, the entire week was great. The only recommendation I would have is to have a "Kick Off" Dinner or gathering on Sunday evening.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- As new to my role as a Director, the majority of the information provided was very helpful and informative. A few of the instructors did not provide concrete information, and I did not feel met the expectation of the course objectives, but the majority were great. There were students in some of the courses that instructors tended to "favor" which wasn't ideal, but I suppose that comes with familiarity. I will continue with the program next year for the course content.
- It's really an amazing program. Every time I get ready to go it feels a little cheesy with all the school/class rah-rah type stuff, but when I'm there I'm so in it. Bonding with your class, learning a lot, having the same people year after year... really amazing. Nice job, US Chamber, y'all really nailed it on this offering. Thank you!
- This is a wonderful program. A couple of suggestions for consideration:
Arriving Sunday for homeroom felt like wasted time. I see the current programming on Sunday as important for First Years, but less so for the other classes. It would be better to require a half hour homeroom early on Monday, or to have our first class Sunday afternoon.
Secondly, a few of my electives were disappointing. In particular, I opted to take ""Fundamentals of Economic and Community Development"" and then ""Advanced Strategies for Economic and Community Development"" believing these courses would build on each other. They did not. In fact, the instructor presented the exact same slide deck to the "Advanced" course. She slightly adjusted the presentation, but I walked away very disappointed I didn't take a different elective. Improving the descriptions for these would be helpful. Also, if our transcripts were shown as we registered so we could see what we've already taken, it would also help shape with electives are chosen.
- The budget cuts were obvious with the most noticeable being around the catering. With no dinner or kick-off that first night plus reduced offerings for breaks and lunches additional funds were necessary for meals. It was also frustrating not having a shuttle service to and from the airport.
- I think the information I learned was invaluable along with creating a network of Chamber Professionals.
- I would like to see a change in the presentations from, for example, [name removed]. Changes in content per facilitator would be a nice thing to expect for those who would like to repeat an elective based on interest.
- See previous comments. Thank you, again, for your hard work!
- I would say that I would have liked to have walked away with more tangible operational tools to better conduct day to day business. Many of the discussions we had with the instructors were great, but were very much fluff and did not provide us with real solutions to the challenges we are facing in our chambers and associations.
- Bring the kick-off dinner back (sunday)! It was a real nice way of meeting everyone before classes on Monday. May be have a class also on Sunday 4-6 and then shorten Monday or Wednesday. It was really rushed getting to the dinner on Wednesday.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

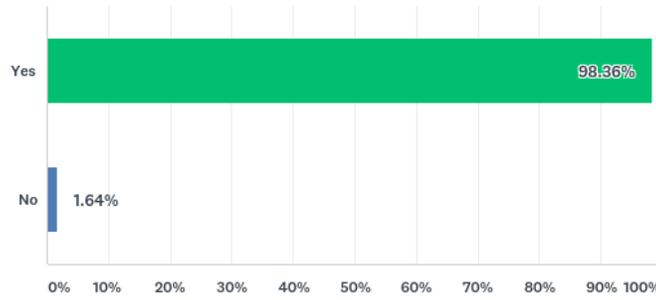
- It would have been nice to have an icebreaker or kick off on Sunday evening like last year. This was a good way to meet people and get to know participants in other years. If there aren't other events on Sunday, why require people only to get there for homeroom? Could have traveled later in the day other than the fact that we had to be there for a 1 hour homeroom only on Sunday. The bash was lovely except that it was quite ridiculous that the 4th years graduating could not be served a drink prior to graduation. Thought the faculty was great this year!
- I enjoyed the time with counterparts from all over the country. It would be nice to have a time when we all the classes are together for a short time. (outside of graduation night.)
- Homeroom should not be mandatory except maybe for first year. To have to lose an entire Sunday at home for about 1hr of welcome/basic information is not a good use of time. As someone who travels a lot, my time at home is very important.
- The first evening you should still gather everyone in the auditorium and do the chants etc. No need for a kickoff BBQ but there should be a short something to get everyone excited, was kind of a waste of time to come all the way to campus Sunday. Food at yacht club was not good for the second year in a row. Location is beautiful but food is awful/undercooked. Less repetition with instructors. I only attended two years at this location but had almost all of the same instructors this year as last year. Would have liked to have heard from some new people. People in my class were really upset by the bar not being open at graduation until later. Not a problem for me but everyone being so upset really brought down the mood and ruined the experience. It was no longer exciting and happy.
- Would really appreciate more interaction with Associations. We are continually "sprinkled" in with chambers. Maybe a site with all associations. Or put all associations in one class along with chambers.
- I learned so much and had a great time. The only thing I think would have been helpful for me was learning how to implement some of the things I learned rather than just taking in all of the information.
- It was unfortunate to have the opening session changed. I feel it is really beneficial to see all classes gathered together to set the tone for the week. Plus, the underclassmen can see how the relationships evolve as the years at Institute progress. And, at the graduation ceremony, to not have the bar open before hand was a little ridiculous. As a graduate to arrive early and finish pictures ahead of time it would have been nice to relax with a drink ahead of the ceremony. I don't believe people would have over indulged. Plus, the poor bartenders who had to stand there just to turn people away while not making tips is just not right. We all plan events for our businesses and this just soured people's moods. Overall, Institute was a great experience and I've made lifelong connections with some awesome people! It's a bittersweet goodbye (or til I see you again).
- Class dinners moved to Sunday evening or some sort of gathering like kickoff. The only time we are all together is at Big Bash. Bagged snacks to take back to class and/or easy fruits (apples, bananas, trail mix, crackers, etc.) earlier dismissal one afternoon like in years past.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q17 Did you leave Institute with at least three or more ideas / takeaways to bring back to your organization?



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NORTHEAST

2018 BOARD OF REGENTS ROSTER

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NORTHEAST

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

2018 BOARD OF REGENTS ROSTER

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NORTHEAST

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

AGENDA

OCTOBER 5, 2018

10:15 A.M. – 12:00 P.M. EDT

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

- I. **Welcome and Introductions** Carrie Stuart, IOM
- II. **Approval of Minutes** Carrie Stuart, IOM
- III. **Nominating Committee Report** Peter J. McNamara, IOM, CAE, J.D.
- IV. **Analysis of 2018 Northeast Institute** Board Members/Institute Staff
 - A. Final Enrollment Report
 - B. Survey Results and Discussion of Institute Week
- V. **2019 Northeast Institute** Peter J. McNamara, IOM, CAE, J.D.
 - A. Create 2-3 Strategic Goals
 - B. Discussion of Week/Assign Regent Responsibilities
- VI. **Institute Staff Update** Institute Staff
 - A. Program Updates and Looking Ahead
- VII. **Other Business/Adjournment** Carrie Stuart, IOM

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



MINUTES

JULY 29, 2018

11:30 AM EDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

In attendance: Carrie Stuart, IOM; Peter J. McNamara, IOM, CAE, J.D.; Steve Clark, IOM, CFE, J.D.; Jeffrey Albright, IOM; Marvin Bond, IOM, CCE; Kate Conroy, IOM; Elizabeth Knowlton, IOM, CCE; Cheryl Kuhn, IOM; Dan Lemyre, IOM, CAE; Jacqueline Lovejoy, IOM; Patricia A. Montgomery, IOM, CAE; Douglas O'Flaherty, IOM; Michael Smith, IOM, CAE, CPA; Robert Uhler, IOM, CAE; Tracy Becker, IOM; Danielle Fitz-Hugh, IOM; Amy Hager, IOM, CAE; John Harmon, IOM; Kelly Jones-Swenson, IOM, CAE; Karyn K. MacRae, IOM, CAE, CMP; Caitlin C. Gayles; Katelynne G. Cox

I. Welcome and Introductions

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

II. Staff Updates and Week Overview

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.

III. Photos and Joint Lunch

Group photos were taken and attendees caught up over lunch.

IV. Class Advisor Responsibilities

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. Other Business and Class Advisor Adjournment

Additional Class Advisor business was discussed and then advisors were dismissed.

VI. Board of Regents Business

- Approval of minutes
 - The minutes from the May 22, 2018 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.



MINUTES
JULY 29, 2018
11:30 AM EDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

- 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.
- Additional business and adjournment
 - Any remaining business was discussed prior to adjourning the meeting.

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



NORTHEAST

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

2019 SCHEDULE OF ACTIVITIES

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

Sunday, July 28

11:30 a.m.–1:30 p.m.
2:30 p.m.–4:00 p.m.
2:00 p.m.–5:00 p.m.
3:30 p.m.–4:00 p.m.
4:00 p.m.–4:45 p.m.
5:00 p.m.–5:30 p.m.

Board of Regents & Class Advisor Briefing: Health Services Building 200
Institute Registration: Bartley Hall, Atrium
Villanova Housing Check-in: Gallen Hall
Graduation Rehearsal (*4th year participants*): Bartley Hall
Homeroom: Bartley Hall, Individual Classrooms
Institute Kickoff: Radnor Hotel Ballroom

Monday, July 29

7:00 a.m.–8:00 a.m.
7:00 a.m.–8:00 a.m.
8:00 a.m.–11:30 a.m.
11:30 a.m.–12:30 p.m.
12:30 p.m.–4:00 p.m.
1:30 p.m.–2:00 p.m.
4:15 p.m.–6:15 p.m.
Evening

Breakfast: Dougherty Hall
Registration: Institute Office, Bartley Hall
Core Classes: Bartley Hall, Individual Classrooms (*Break: 9:30–10:00 a.m.*)
Lunch: Dougherty Hall
Core Classes: Bartley Hall, Individual Classrooms (*Break: 2:00–2:30 p.m.*)
Class Advisor Meeting: Faculty/Regent Lounge, Bartley Hall
Elective Classes: Bartley Hall, Individual Classrooms
Class Dinner Option

Tuesday, July 30

7:00 a.m.–8:00 a.m.
8:00 a.m.–10:00 a.m.
10:30 a.m.–12:30 p.m.
11:00 a.m.–11:30 a.m.
12:30 p.m.–1:00 p.m.
1:00 p.m.–4:30 p.m.
2:00 p.m.–2:30 p.m.
Evening

Breakfast: Dougherty Hall
Elective Classes: Bartley Hall, Individual Classrooms (*Break: 10:00–10:30 a.m.*)
Elective Classes: Bartley Hall, Individual Classrooms
Board of Regents Meeting: Faculty/Regent Lounge, Bartley Hall
Box Lunch: Box lunches available in Bartley Hall Atrium
Core Classes: Bartley Hall, Individual Classrooms (*Break: 2:30–3:00 p.m.*)
Class Advisor Meeting: Faculty/Regent Lounge, Bartley Hall
Class Dinner Option

Wednesday, July 31

7:00 a.m.–8:00 a.m.
8:00 a.m.–11:30 a.m.
9:00 a.m.–9:30 a.m.
11:30 a.m.–12:30 p.m.
12:30 p.m.–4:00 p.m.
6:30 p.m.–9:30 p.m.

Breakfast: Dougherty Hall
Core Classes: Bartley Hall, Individual Classrooms (*Break: 9:30–10:00 a.m.*)
Class Advisor Meeting: Faculty/Regent Lounge, Bartley Hall
Lunch: Dougherty Hall
Core Classes: Bartley Hall, Individual Classrooms (*Break: 2:00–2:30 p.m.*)
Graduation Ceremony and Big Bash: The Inn at Villanova University

Thursday, August 1

7:00 a.m.–8:00 a.m.
8:00 a.m.–11:30 a.m.
9:00 a.m.–9:30 a.m.
10:00 a.m.–10:30 a.m.
11:30 a.m.

Breakfast: Dougherty Hall
Core Classes: Bartley Hall, Individual Classrooms (*Break: 9:30–10:00 a.m.*)
Class Advisor Meeting: Faculty/Regent Lounge, Bartley Hall
Board of Regents Meeting: Faculty/Regent Lounge, Bartley Hall
2019 Northeast Institute Concludes



NORTHEAST

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

2019 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

Class Advisors

Douglas O'Flaherty

Silent Auction/Fundraising

1. _____

2. _____

3. _____

4. _____

Industry Consultations

1. _____

2. _____

Scholarships

1. _____

2. _____

3. _____

4. _____

Opening Welcome

1. _____

2. _____

3. _____

Big Bash

1. _____

Volunteer/Faculty/Staff Dinner

1. _____

Ambassador Program

1. _____

2. _____

3. _____

State Photos (Optional)

1. _____

2. _____

Customer Service Strategy (Optional)

1. _____

2. _____

3. _____

4. _____

Social Media Strategy (Optional)

1. _____

2. _____



NORTHEAST

GEOGRAPHIC BREAKDOWN

2018 Northeast Institute

150 Attendees from 33 states and the District of Columbia

State, Number of Attendees, %

Arkansas,	2,	1.33%	North Carolina,	2,	1.33%
California,	1,	0.67%	Nebraska,	2,	1.33%
Colorado,	1,	0.67%	New Hampshire,	3,	2.00%
District of Columbia,	14,	9.33%	New Jersey,	6,	4.00%
Florida,	2,	1.33%	New York,	4,	2.67%
Georgia,	1,	0.67%	Ohio,	1,	0.67%
Iowa,	1,	0.67%	Oklahoma,	4,	2.67%
Illinois,	5,	3.33%	Oregon,	1,	0.67%
Indiana,	2,	1.33%	Pennsylvania,	12,	8.00%
Louisiana,	1,	0.67%	Rhode Island,	2,	1.33%
Massachusetts,	8,	5.33%	South Carolina,	4,	2.67%
Maryland,	14,	9.33%	South Dakota,	1,	0.67%
Maine,	1,	0.67%	Tennessee,	1,	0.67%
Michigan,	3,	2.00%	Texas,	6,	4.00%
Minnesota,	1,	0.67%	Virginia,	36,	24.00%
Missouri,	3,	2.00%	Vermont,	2,	1.33%
Mississippi,	1,	0.67%	Wisconsin,	2,	1.33%

Top Increases since 2017:

Virginia	+5
District of Columbia	+5

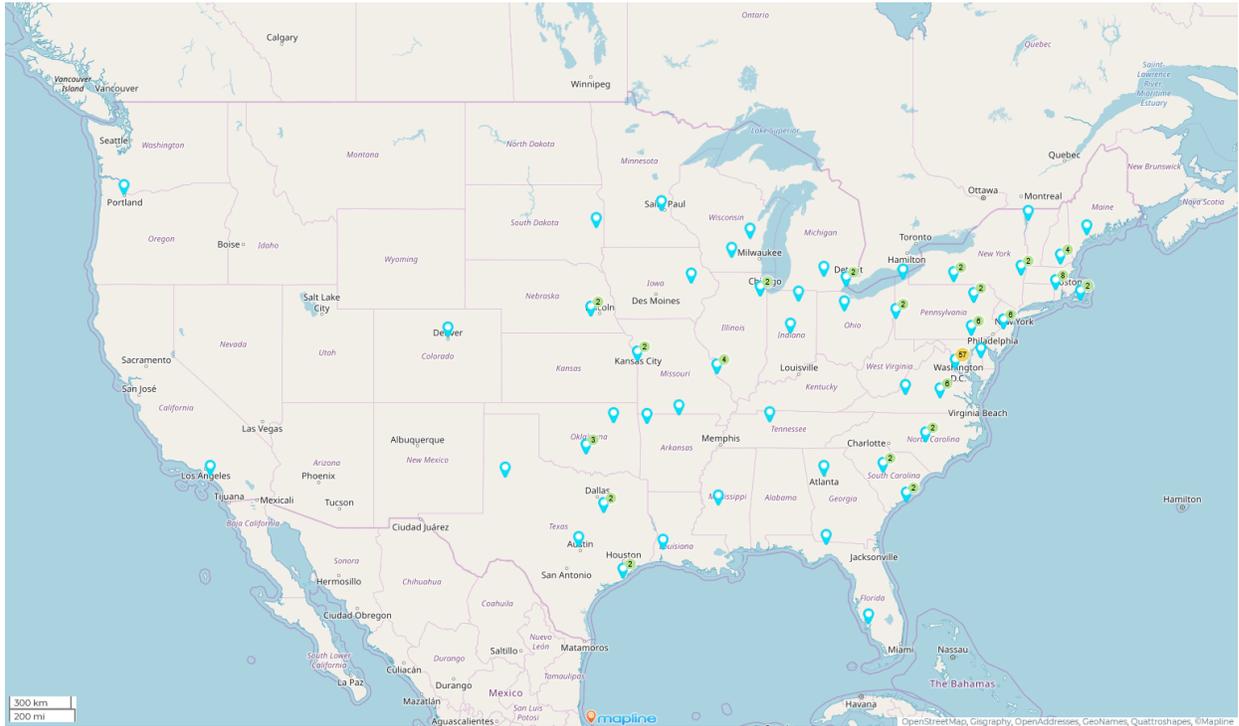
Most attendees in 2017, Virginia with 31
Most attendees in 2018, Virginia with 36



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GEOGRAPHIC BREAKDOWN



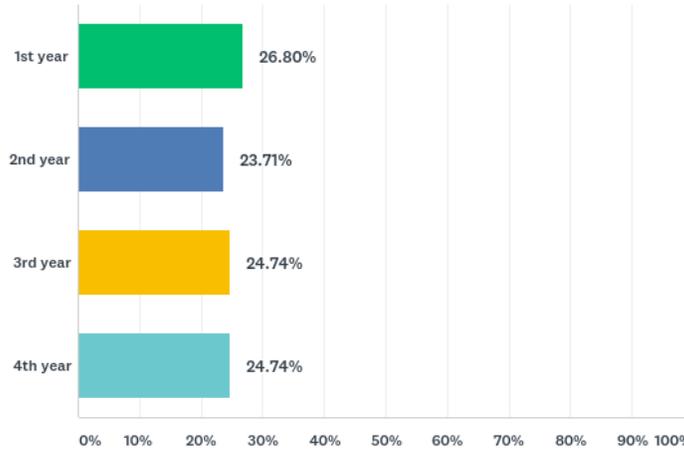


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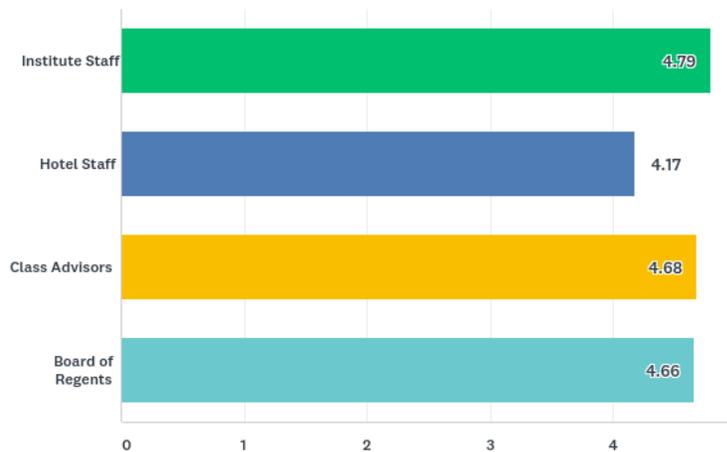
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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q1 Class level:



Q2 Customer Service (with 1 being poor and 5 being excellent):



Additional comments about registration and communication*:

- Our class advisor could have been better informed about things/better prepared to answer questions.
- I ended up leaving the Radnor Hotel to stay at the DoubleTree in King of Prussia. The RH's room had a strong mildewy smell to it. Since I heard them say more than once to other attendees that they didn't recommend going higher than the first floor, it was best I leave to go to a better hotel with all around better service.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- I have had the general feeling every year that IOM cares about developing a sense of community.
- Our Class Advisor this year, 3-1 was the best one yet!
- The hotel was just awful. I highly suggest a hotel block at at least one other hotel. It was moldy, there are no events at the Radnor now, the customer service was some of the worst I've ever experienced. Proximity is literally the only reason to do business with this hotel again.
- Communication in general seemed slightly less effective than in previous years.
- I don't believe I met any institute staff while there. The Board of Regents members I met seemed a tad on the unprofessional side.
- Loved all aspects of the experience as it relates to institute staff, class advisors and board of regents; it was nice to see all of them interacting with the students.
- Our class advisor had his admin send ever email and didn't do anything for the class. He delegated everything have students take attendance and everything. Additionally, I had asked for a private consult and completed the form and was never contacted. I asked institute staff and they informed me we would meet later.
- My room at the Radnor wasn't ready until after 6pm and the staff didn't seem concerned about it. Restaurant staff were unpleasant as well. Our class advisor passed his duties to his assistant which caused us great confusion in planning the class dinner, etc. His assistant sent us information to read about his organization - why? He spent class time, twice, talking about his important issue - which is diversity. In the end, we really liked him, but it took a lot for him to grow on us.
- Didn't really interact with the staff.
- Everyone tries to be very accommodating and welcoming.
- Thank you all for the warm welcome, helpful hints and herding of "cats" all week!
- Everyone was extremely friendly and helpful. Shout out to [name removed]!
- The staff at the hotel bar was very rude. We waited for over 20 minutes to place an order and when the order arrived it was incorrect.
- The board of regents really were wonderful.
- Always great focus on welcoming attendees and ensuring availability.
- Everyone made us feel welcome and could ask anyone any questions we had.
- Overall, everyone affiliated with IOM were personable and willing to help.
- [Name removed] was the best!
- We had a rough start with our advisor but onsite he was fine.
- Service from staff and volunteers was as expected at all points.
- Excellent. Many took the time to learn my name.
- The Board of Regents REALLY made me feel more at ease, welcomed, etc. They always greeted me in the hall, asked how I was doing, etc. It helped!
- Everyone is always very engaging and friendly.
- Almost everyone was fabulous! There was only one instructor I had an issue with, but other than that, it was a great experience!

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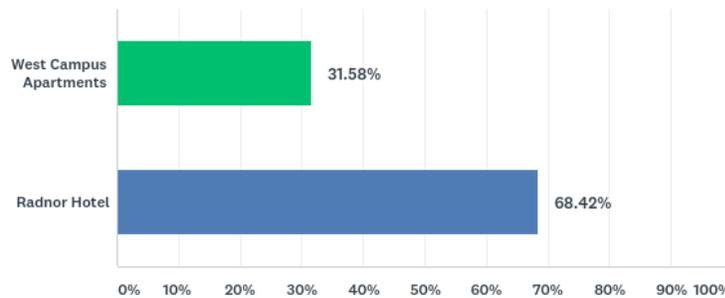
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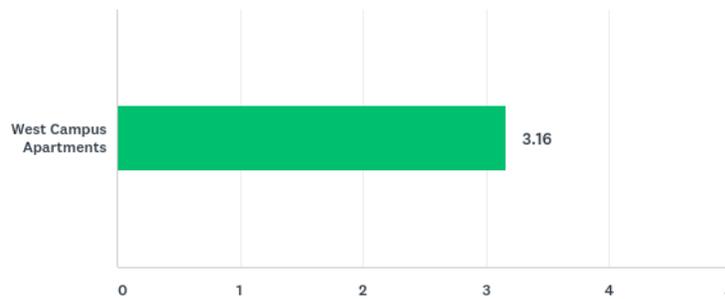
ATTENDEE SURVEY RESULTS AND FEEDBACK

- I stayed on campus and the housing folks were not very attentive (and the room was noticeably unclean).

Q4 Which hotel did you stay at?



Q5 If you stayed at West Campus Apartments, how would you rate your accommodations?



Additional comments about accommodations*:

- Low water pressure in shower
- Room was cold; bedding was thin, so it was difficult to stay warm. The floor had spots where dust/dirt was collected but not picked up. I had to clean the shower before I could use it.
- The dorm room was dirty and missing any sort of usual amenity. The Radnor was full when I booked.
- It was dirty and damp.
- They were very bare bones. I understand that it was a dorm setting, and I didn't have 4-star expectations, but I was not very comfortable and will likely stay off campus last year. Also, I recommend including a list of things to pack that aren't available in the dorms: better soap products, hair dryer, iron, etc.

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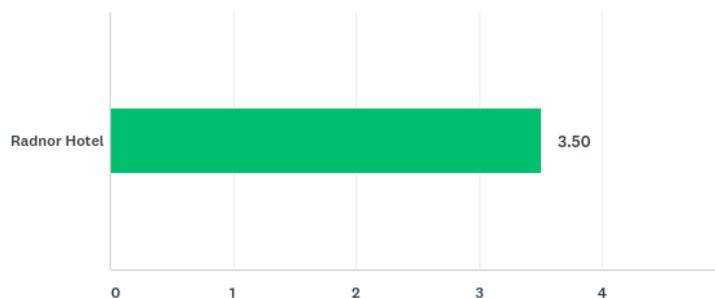
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ATTENDEE SURVEY RESULTS AND FEEDBACK

- For the price they are great! Suggestion: In the info package for Institute, please mention that attendees should bring their own bedding if they can, it makes the stay much more comfortable.
- The floors were dirty, but overall accommodations were good.
- It was pretty clean but those beds were TERRIBLE! Definitely worth the extra to stay at a hotel.
- No frills room was mostly clean and comfy. Only complaint is floors were a bit dirty/needed a sweep or swiffer.
- The room we were in was not cleaned very well. One toilet could only be flushed twice a day (not kidding). The plugs in one room were not working. The room smelled of mildew
- Room did not appear to have been thoroughly cleaned - bathroom mirror had a streaky film on it and hair found in sink and tub.
- Bed linens were damp again for the 3rd year in a row.
- All my clothes are always damp when I leave the apartments. Everything in my suitcase gets damp.
- I like the Residence Inn much more than the Radnor. I like the flexibility of having a kitchenette in my room.
- Clean, but horrible beds and the light in the bathroom fell on me my first night, and I was shocked while trying to put it back in the ceiling. It was promptly fixed when I called to complain, so thank you.
- In general they were acceptable. In fact I plan to return to campus housing next year. But the space was not clean - really not clean - and I felt that a quick list of recommended items (like coffee and a pot) might have been helpful.

Q7 If you stayed at the Radnor Hotel, how would you rate your accommodations?



Additional comments about accommodations*:

- I was there long enough to rate them at a 2. Customer Service iffy and room was smelly.
- The room's AC was a little off. Either too cool, or if not on, a bit damp. Other wise, all was good.
- See comments above.
- I was hoping for laundry machines because of the long stay and in - room refrigerators.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- With a stay of 4+ days, it would be nice to have a fridge in the room, and a microwave at least available in the hotel's common space, for keeping and reheating leftovers.
- I was happy to be in a remodeled room. The Radnor staff made sure I knew that it was a preferred room (and it was).
- I didn't have this problem but I heard from a number of people on the other end of the building that there was a huge problem with it being musty. I will say I do think that hotel is in need of updating. Carpet is very worn and it just doesn't look as great as it did three years ago when I started my IOM experience.
- Needs some updating but otherwise pleasant. Hotel bar staff was NOT great this year. Many were displeased with them.
- It was nice for the most part. It is a little outdated and the rooms are small. The Sunday brunch was very good. The restaurant food was just okay, nothing special.
- I thought the rooms were fine and liked being close to campus. Not all the rooms were available to check in on Sunday before Institute started. I didn't get into my room until after returning from homeroom.
- The Radnor is showing a lot of wear. It was nice have a restaurant and bar, as well as being close to other options in the evening. But, the towels in the bathroom were threadbare, the rooms are small, they do not have a refrigerator, etc.
- Unfortunately the Radnor Hotel was very lacking this year in service and accommodations.
- I stayed at the Radnor before and it was wonderful. Very disappointed with treatment on the front end this time.
- The Radnor Hotel needs to be renovated. However, since very little time at Institute is spent in the hotel room, the accommodations are tolerable.
- Not clean, horrible food, no real room service. No pool. Run down.
- Our room was not ready upon check-in so they compensated us with 2 free breakfasts (which we didn't use because of the institute meals provided).
- The hotel was not ready for our group at 3pm, the stated check in time.
- Stayed in the Garden Level. Smelled like mildew and mold. Upon check-in, the staff at the front desk asked if we meant to book the Garden Level rooms but wouldn't tell us why we should have questioned that. Upon walking down the stairs, it became clear that there are moisture problems with the rooms on that level. Additionally, phone/wifi access were limited in the basement due to reception issues.
- I was put in a room in the basement and it was terrible. I could see mold on the ceiling, the room was damp and musty, and there was a strong odor that I can only assume was there to cover up the musty smell. I asked on several occasions to move to a higher floor as was suggested by peers, but there were no additional rooms available.
- I understand the need for choice, but I truly feel classes would gel better if we weren't so spread out. As a minimum, don't spread everyone out across campus in diff dorms.
- damp, smelled like there might be mold somewhere in the room, uncomfortable stay and no other rooms available

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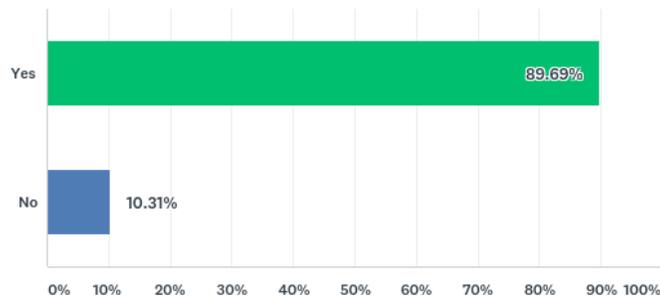
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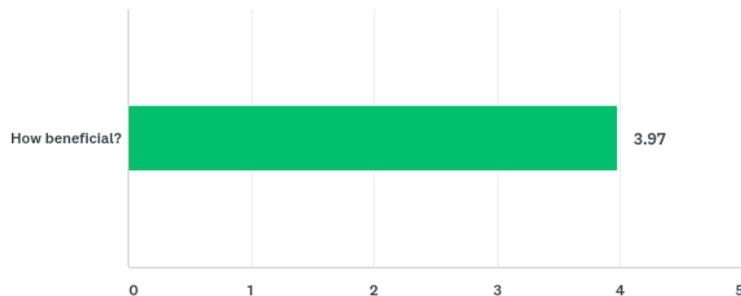
ATTENDEE SURVEY RESULTS AND FEEDBACK

- Would really love to have a mini-fridge. Reservation was incorrect and due to a willing classmate we were able to correct the issue...
- I wish there was a fridge/microwave in the rooms. Comfortable rooms, but the dining options in the hotel were somewhat limited. A pool would have been great!
- IT would be really nice if they had refrigerators and microwaves in the rooms
- I communicated to the Radnor two concerns I had with my stay. My room was on the ground level below the lobby. First, there was a strong smell of mildew beginning at the top of the stairs that permeated throughout the downstairs and hallway. Second, the internet and cell service was not adequate on that level. I had to go upstairs to use my cell phone.
- Enjoyed my stay over the 4yrs at the Radnor. Great Hotel
- They need to update the rooms a bit. Too old fashioned for me.

Q9 Did you download the 2018 Northeast Institute App?



Q10 If you downloaded the app, how beneficial was it to you?



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ATTENDEE SURVEY RESULTS AND FEEDBACK

Additional comments about the 2018 Northeast Institute App*:

- The app is helpful to have the schedule and handout available, but it is a MASSIVE PAIN to have to log in every. single. time. you access it -- sometimes twice in each session.
- Just never got around to it.
- I really like being about to do the survey on the app. I hope the shortened form is still helpful to the instructors.
- I had to login regularly-it would log me off about every other time I tried to access it.
- It wouldn't download for me. I tried Sunday and Monday and then gave up.
- If I didn't have to do surveys in the app, I wouldn't have used it.
- The only reason I used it was for the evaluations.
- Wasn't able to download the App to my phone - probably because my phone is so old.
- The app was very beneficial. It was a great way to keep track of the schedule and to know what was going on and where. Also easy to utilize for the poll surveys at the end of each session.
- I do not like that I have to login every time I want to use the app. That requirement is antiquated technology. No other app on my phone requires this.
- It would have been nice to see more interaction within the app as it relates to speakers and attendees - maybe other incentives to get people engaging? I could have missed the engagement part of that, as well.
- It would be nice if it was prepopulated with our schedules when we log in
- Automatically sorting the schedule by day was a nice improvement. There was less emphasis and reminders for completing the surveys as in the past.
- It's very buggy.
- It was inconvenient to sign in every time you wanted to use the app.
- Had to log in every time I used it - very cumbersome. Also sometimes had to re-log in once already in the app.
- I used it somewhat. I can't say that it really helped because I just didn't really use it that much.
- The app was great for tracking your schedule and handouts. I liked being able to complete the course evaluations on the app.
- Were the class surveys on the app differently this year? For whatever reason there wasn't as much as a push and/or it wasn't as easy to get to.
- I only used it to rate the instructors.
- Didn't download app until Day 1 on-site. Perhaps making app available a week or two prior to IOM start would ensure that more people use it. Once opened, app was valuable and easy to use.
- I would have downloaded the app to my Chromebook, but it wasn't compatible with my device. It would have been easier to read the course materials on my Chromebook's larger screen.
- Made it very easy to complete surveys and know which classes were on my schedule.
- App required sign in and select site each time. Several times it was unavailable.

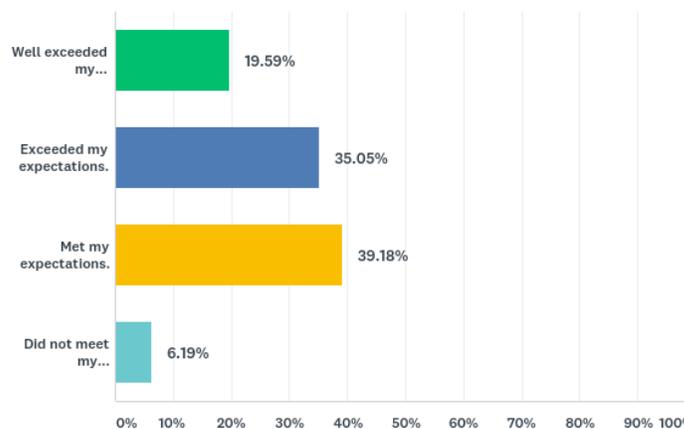
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ATTENDEE SURVEY RESULTS AND FEEDBACK

- It's a great tool and easy to use. You should be able to save the printing costs of the booklet you give out and just go with the app.
- Very user friendly - well done!
- The ap was great!
- The app can be a little quirky, but I really loved it and find it very useful.
- I really appreciated the information on emergency preparedness that was in the app. Kudos to Institute for making sure this was included.
- I didn't end up using it, but I'm also not a huge technology users.
- I didn't use it.
- Really enjoyed it, if I may suggest, walk people thru it the first day, show where they can add photo's, etc... so that people engage more. Being able to download Favorite Contacts would be a big bonus.
- Easy to use, but I wish I could change a class survey. I had additional things I wanted to say regarding one class, but as I'd already completed the survey, I couldn't go in and edit it.
- We might see more traction within the app if it was mentioned in some way in each session (maybe build in key info or 'flash events' too).
- It would be nice if on the attendee portion of the app you could have the option of sorting into your class like you can the course selections.(i.e 1.1, 1.2 etc)
- It was extremely helpful this year. There was no need to carry bus schedules and the instructor reviews were much simpler on-line. Great technology tool!
- Didn't use my app all that much this year seeing I had my Computer with me. Overall app was put together well and worked perfectly.
- The app was ok but I still think it was nicer for the evaluation forms to be there. I get the ease of the app but sometimes I personally forgot to go on there.

Q12 Overall, to what extent did Institute meet your expectations?

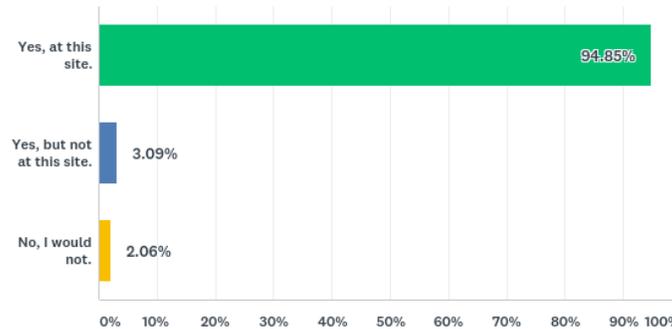


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ATTENDEE SURVEY RESULTS AND FEEDBACK

Q13 Would you recommend Institute to other nonprofit professionals?



Additional comments*:

- I have to say, I was a bit let down this year. Last year wildly exceeded my expectations so perhaps they were unfairly inflated, but I found the content somewhat simplistic this year and *quite heavily* skewed to chambers. (I am a national association.) There were 2 or 3 sessions I got zero out of. I was also very disappointed that the session on "Using Data to Grow and Sustain Your organization" was not offered as an elective. Please offer it next year. Still a big fan of the program but with tempered expectations.
- I learned so much at Institute. I was glad my chamber support my professional developments by providing me the opportunity to be part of this. I met some great people as well. As our chamber continues in transition and as we prepare to bring aboard our new CEO/President, I'm excited about applying some of what I learned at Institute to help make our chamber and staff that much better.
- I missed the welcome dinner and would like to see something like this come back. (Even if all we have is a glass of wine and light snacks.) I also feel the first day's schedule is a killer - very long. Would it be possible to do one session Sunday afternoon & a welcome dinner and shorten Monday's program? I'd make Monday a free night to let catch their breath, then have class dinners Tuesday, the Big Bash Wednesday and wrap up Thursday.
- I would bring back the welcoming event. It doesn't need to be long or expensive. Take some time during homeroom to get better acquainted with classmates. Ask for more than name and company. Team building is crucial at the first contact. It appeared that the banquet was lackluster. I was always taught that a toast with water was unlucky. We only have 2 drink tickets, why not have the bar open in the beginning before the graduation ceremony for a proper toast and send off. When state photos were being taken, I was told to "Take a Selfie" since I was the only one. Really bad form for a service institute. But all of this was not the purpose of Institute. Classes were great, I found the information useful and pertinent to my career and position. The social /inclusion issues are how you make us "feel" about Institute and something that the Advisors and Regents can work on to make better.

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Institute for Organization Management

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Everything ran smooth as always. I understand the importance of making sure all hours of criteria are met, but I do miss having a day where we were out at 2p to explore the city. I loved how the breaks were scheduled so we knew when we could expect a break, but it did seem like 30 mins before the scheduled time, 1/3 of the class (each time) was up and out of the door to take a restroom break, especially after our lunches. All in all--great job!
- It would be nice if Institute staff provided help with class dinners. It's hard for one person to take the financial burden of being the guarantor for a large group of people at a restaurant or other location. Also, I'd like to have more networking time built into the schedule. Lunches are a great way to meet folks from other classes, but once you walk to the cafeteria, get your food, eat, and walk back, there's only a short amount of time left to speak with other attendees. I'm glad there was no required welcome dinner this year, but it would be nice to have some kind of optional reception. This would allow attendees to see folks from the previous year, meet any first-timers, and catch up before the first day of class.
- I heard many comments about the lack of a cocktail hour prior to the Big Bash dinner. It had an impact on the atmosphere of the event. The 4th year class seemed especially disappointed. I also heard several people say they were disappointed there was not a mixer on the first night. I understand this was due to budget constraints, but honestly, these two events are where I made some of my best connections at Institute. I think an extra \$50 to \$70 on our registration would not be out of line to cover the cost of an opening event. An hour in homeroom on the first day resulted in a waste of a night in a hotel. The opening mixer made something constructive out of our time there, especially two years ago when we were more-or-less required to take part in the games provided. I made many close friends through these activities and I feel the connections we make are a very important part of attending Institute. I could live without the binder you distribute to each of us if you are looking for opportunities to save some money. I use mine and I like it, but I can bring my own note paper instead or I can take notes on my computer. Also, I would only play soft, background music during dinner at the Big Bash. The band is great, but very loud. It is hard to carry on a conversation around the table. Overall, a great week with outstanding classes and staff. Thank you for all your hard work.
- The Institute Kickoff needs to be brought back as the only time that all four classes were together and able to interact and bond at all was graduation and it is too late in the week for that to happen.
- Felt so welcome by the Board of Regents. Great enthusiasm and you would tell careful planning and lots of thought went into our experience at Institute.
- You need to find a new lawyer to teach your legal classes. The lawyer oversimplified sex harassment law. He openly bragged about committing ethical violations, for which he could be disciplined. He also offended several classmates with his description of those with psychological problems and references to the "me too" movement. He is a liability to IOM. Full disclosure, I am an attorney.
- I didn't get as much out of the 3rd year content as I did 1st and 2nd year. I wish it had been more challenging.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- There were obvious changes to this year's IOM. I feel that the first night (Sunday) the orientation and dinner needs to be added back into the program. As a fourth year, I was fine with missing the dinner, but I felt that the first year students need the community feel and vibe from the gathering. This will help retention and recruitment in the future. Also the big bash needs to be mandatory for all classes. I noticed a large number of people left before dinner was served. This sets a precedent that classes can miss the event and/or leave and come when ever they want. IOM is about community, relationships, tradition and pride. I would recommend that the board takes a look a look at the changes made to this year and continues to adhere to the integrity of the program.
- I had high expectations and hopes, and they were met and exceeded! I didn't necessarily like the first dinner at Pip & Bailey's, but I do think it's valuable 'get to know you time.' Maybe another location/activity type of event.
- On the last day or two there was coffee available in Bartley Hall before the first class. I really liked this and would like to see it again next year for the full week. Most of the time in the morning I don't want or need the full breakfast from the dining hall. That early I really just need coffee, and since we can't take it out of the dining hall having it where the classes are is preferred. Maybe also have some of the items out that would be out at the morning break (yogurt and/or fruit and/or muffins) with the coffee and then the rest during the break?
- Too many things changed this year. There needs to be a kick-off dinner to build relationships (plus people who had been there before were planning on the dinner).
- The courses were relevant and very helpful. The opportunities to network and gain insight from other attendees was also very good. I am grateful for the time at Institute and look forward to the next three years!
- Very minor details - but I'd bring back the water bottles (don't necessarily need 2 bags and a tree, they were great but the water bottle was very useful. I bought one to carry through the week). Also the schedule of the graduation/ dinner was awkward. I think you can still have the reception and let people use their drinks tickets to grab a drink and mingle while they're waiting for the announcements/ dinner to start. Close bars 5 minutes before announcements begin. Everyone stood around waiting since most arrived early. Doesn't need to be in a different room/ area though which I'm sure saves \$. The schedule of classes went well this year. My instructors were terrific. If you want feedback from attendees on each session, I'd bring back paper surveys. Some of us had trouble accessing the app, some people never downloaded the app, internet was spotty at times- I'm guessing all this led to less survey responses.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Feedback on Programming: Some of the classes were great and informative while others were either too basic or the instructor seemed disinterested. Specifically, the instructor for executive law didn't answer questions and spent the last 20 minutes of class discussing good books he'd read. The Sponsorship Elective was okay but seemed more like a peer than an expert - not a ton of new ideas/information. [Name removed] actually made finance interesting, [name removed] did a great job with Hiring/Firing and [name removed] is a hoot.
Logistics Feedback: If you are going to schedule things where people need a car (Sunday Night/Monday night) tell people they need a car. The location of the dorms (a 15 minute walk to campus plus no dining or convenience store within walking distance is odd when there must be campus housing near the site of the classrooms. As a first year student, there should have been icebreaker activities built in to the homeroom meeting on Sunday so that people go to know each other. Going from an icebreaker or teambuilding activity into a welcome reception would have been much better than an hour logistics meeting and then sending people off to a weird, unprepared bar. The band at the big bash should start playing AFTER dinner so that you can actually speak to the people at your table. The Inn at Villanova did nothing with my allergy card, served me something I was allergic too and then told me to "eat around" the allergen when I asked for a replacement. I would do the professional headshots on a different day. A headshot when I'm in a cocktail dress isn't useful. That or change the recommended dress for the big bash. Overall, while I learned a lot and appreciated much of the academic part of institute, I thought the rest of the program was fairly disorganized.
- I am deeply concerned about the class I took with [name removed], "Is that legal?" Not only was his class disorganized, he personally offended several people in the class by using discriminatory language and gave questionable legal advise.
 1. On several occasions throughout the class, he referred to people with mental illnesses as "nutcases," and at one point, stated that you should avoid hiring them as they only cause trouble for businesses. Not only is this illegal under the ADA, it is incredibly offensive.
 2. He gleefully told us a story about a time when he destroyed evidence in a potential case. This is a clear breach of legal ethical standards, unprofessional and, quite frankly, bizarre.
 3. When discussing sexual harassment, he suggested solutions that were discriminatory (no longer meeting alone with women), bizarre (one story involved his secretary taking her shirt off in his office), outdated (you will know harassment when you see it because all women react in certain ways), and offensive (you have to question all interactions with women now because they might sue you). As someone that teaches sexual harassment training to my members, I am horrified that this sensitive, incredibly important topic was approached in this manner. It was a disservice to the people who attended the class and women who have suffered from harassment.
 4. When I asked him a question about a situation that happened at my company, his response was, "just blame it on the lawyer." I am the lawyer for my company and I found his answer to be quite shocking. I have generally been impressed with the quality of teachers at IOM, which is why I find it so disturbing that [name removed] continues to teach. I heard from other classes that this is not the first time that he has used these examples, nor is it the first time students have expressed concerns. I hope that IOM takes this seriously - I would be hard pressed to return to a program that continues to use him as a teacher.

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- First and foremost, I had a good experience and love the networking and bonding that goes on with my peers. In typical fashion, it's easy to point to the lesser parts of the experience but in the context of helping to improve the experience in future years, I want to share two things that were disappointing to me. I felt really poorly about the approach on the state photos and still haven't figured out the purpose of those. I am the only representative from my state and I felt very slighted by the process. I support the concept but why were pictures not taken for every state represented? Or, at the very least, take a group shot of all of those that were the only attendees representing their states. The second disappointment was the Big Bash. It lacked luster in the beginning and I think a large part of that was due to the lack of networking and drinks prior to the event. Next year will be my fourth year and I certainly hope that there is more thought put into a better format and structure. I'm all for trying new things but I just don't think what was tried this year worked very well.
- The classes, again this year, seemed rather elementary/entry level. I would love to see more focused classes and to possibly change one of the elective days into a break out of specific types of chambers/associations. So put CVBs in a focus group, Chambers of certain sizes together, and group Associations accordingly as well. Hearing ideas from other similar organizations deems quite helpful.
- The cancellation of the Sunday evening event was a disappointment and should have been more thought out regarding the impact on the first year students as well as the other classes. No reason was given for the cancellation and the only thought I have is money. In that case, something else should have been done in place of the event, a happy hour with case bar and some pass arounds or a veggie cheese platter, etc. You should re-consider the schedule. Having a long day on Monday followed by class dinners does not make sense when the next day, Tuesday, is a short day. Either shorten the schedule on Monday or have the class dinners on Tuesday. Please get bring an end to the paper bag lunch and have a regular one hour lunch and end the day a half hour later. This bag lunch really cheapens the experience and it is just not what should be expected.
- I like the idea of a group photo by state, but having every single state in the lobby at one time was a bit much and took way too long for those who were at the end of the alphabet (Virginia!). Consider breaking this up over the span of the week. Overall, IOM is great! Thanks for all you do!
- The personal connections made this program are extremely valuable and I am so grateful for the networking opportunity. I would benefit from breakout sessions where I can meet with other professionals from technical professional societies as we have some unique needs and challenges. I thought that the core class this year were not as helpful as the ones in the past. I felt that a lot of the content was repeating things that we had already learned in previous years. It felt a bit basic and I was hoping for me in depth information. I was also hoping for more leadership training. I think more sales training may also be beneficial as well. My final comment is that without the welcome event Sunday should have an event added to it to make it worth coming on Sunday night. The homeroom should be more structured at least or maybe have like a round table event with the class to discuss challenges and solutions.

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- I would love to see the class advisors remain with the class each year (following them through the process). I feel that would help give consistency and someone who we could always rely on being the same. I'd also like to see more collaboration between the two classes for the first year. That was a bit unclear to many of us and it actually promoted some competition, which I would refrain from. I think more camaraderie between the two classes would have been beneficial; after all, we'll all be 'combining' at some point anyway. Overall, this program is fantastic. My only issue is that I'll have to wait a year before I see everyone in this setting, again :-). Thank you to all the staff and board who helps put together a stellar program!
- I was disappointed to see the drastic difference between the Northeast Institute and the Institute in Tucson--- and all for the same money. NE Institute didn't have the first evening get-together, the Big Bash seemed to penny pinch in every direction (no appetizers/cocktail hour, no wine with dinner, a plated meal option that was not appealing, etc.), and having to go to a cafeteria that is halfway across campus and has food not even fit for elementary school is not a good use of my registration dollars. If the high rate of tuition is so the instructors can be paid to solicit more business in the classroom, then Institute may not be the right path for me to continue to pursue.
- Great experience overall. I would suggest that the curriculum objectives be more prominent and provided to students. Each instructor presents learning objectives, so why not present the learning objectives for each class. A brief presentation at homeroom of that year's learning objectives would be a low-cost, high benefit change. Consider mixing in other teaching methods, such as case studies. Instructors also bring in different perspectives. How about a panel discussion on a particular topic/issue? I'd love to see an experienced executive or board chair debate Bob Harris, or a Fran Kenney's latest innovations be contrasted with the long-term trends class instructors, or any other topic that will stimulate debate among students, faculty, and staff/regents. Lastly, 4th year for me felt a bit repetitive. I got a lot out of 3rd year, but less so from 4th - hence my suggestions to bring some innovation to the curriculum.
- Institute has been a wonderful experience and integral part of my development as a leader. Each year gets better and better. Thanks so much!
- The week needed a kick off event as there was in previous years. There was no cohesion going into the sessions and we did not get a chance to see the other classes all together except at the big bash/graduation. I remember that as a first year I was in awe of the 4th year class and it was fun mingling with them.
- I love Institute - there were some kinks this year, so I shared FYI. I'm sure next year will be marvelous!
- I would move the class dinners to Tuesday or even Sunday now that there is no welcome dinner. Monday is a long day and adding the class dinner on top of it is a little overkill.
- I took two law classes this year, [name removed] is very nice, however, the material wasn't very meaty. The class was disjointed and hard to follow.

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- I would recommend reestablishing the Sunday night dinner at the hotel. It was nice to have an organized activity to instill a sense of camaraderie among students. Although the food at prior Sunday evening's dinner was subpar, I think the Sunday evening dinner was a great kickoff to the week. Also I heard many comments from classmates that they would like the cocktail reception reestablished prior to the Big Bash on Wednesday evening. Thank you for allowing Avon to be our class advisor. Overall, Institute was an awarding experience.
- I truly enjoyed my first year IOM experience. The classes were very helpful for now and into the future. The networking was priceless. I understand there used to be an organized Sunday evening reception. The place we went to as a group that first evening was nice, but did not lend the opportunity to network with the other classes. Perhaps the opening reception could be reintroduced into the program? We attendees that drove in could bring "donated" beverages and snacks; just a thought. I cannot wait till next July!
- I think there should be a more official welcome event for the first years. Flip and Baileys was a little disorganized and hard to meet people or determine who was in our class. Something a little more structured would have been nice.
- I had a great experience but I do have a few suggestions. 1. Let the graduating class have the 3010 room it is the nicest room and I think it should go to the 4th years. Also do not make the graduating class sit alphabetically, it is a time of celebration and you want to do that with the friends you have made. And lastly and I am not sure if you can do anything about it or not but I really think that the girls that are the university for volleyball should be made to put actual shorts on when going to the dining hall. I found it very inappropriate for them girls to be walking around basically in underwear in a mixed crowd. Thank you
- Great week at a great venue. Mobile app being launched earlier would have made for better usage & interaction. Overall it was a success. Cheers to all involved!
- As an older professional, I would have preferred a better dining experience than being crammed into the university's dining hall. Lunch was over-crowded and uncomfortable. While I appreciated that snacks were offered during breaks, I would have preferred some healthier choices rather than high sugar and high carb offerings. Also, the box lunch was mediocre at best.
- Seemed like a lot of changes. First night with cornhole and drinks gone, we missed that. Big Bash no cocktails for the first 1/2 hour, we did not know why. My chicken at the big bash was so dry as was the rest of my table that most did not eat it, went back to the Radnor and order pizza from a local pizza joint. I would like to have you offer a different hotel than the Radnor, we nicknamed it the "Ratnor" due to the small furry guests we saw, ha! the IOM staff was amazing as usual. Sorry to seem rough in my comments but just being truthful. Over all a great experience. Shop out a different hotel and venue for next year, I have worked in the hospitality industry for a while and if you go there year after year they have a tendency to "cheap out". Thanks.
- One hour of homeroom on Sunday without any other scheduled activities is difficult for students who give up much of their weekend to travel to Institute. That, coupled with a very long day on Monday plus our class dinner, does not seem to be the best use of time. Suggest moving something into Sunday afternoon and shortening one of the other days, and also moving our class dinner to Tuesday night.

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- Overall, this week provided a very valuable experience for my professional development. The teachers were all wonderful and clearly enjoyed being there as well. The advisors and regents were welcoming and very helpful.
- The bash is a great way to celebrate 4th year students. However, I suggest a different venue and setup. Most people left immediately after dinner and a good number of them went to get dinner elsewhere. I felt embarrassed by how much food was wasted. Perhaps a graduation ceremony on campus followed by a happy hour with drinks and appetizers may be a better fit for the group and the budget.
- I was surprised the mixer on Sunday and the happy hour on Wednesday were eliminated. IOM stresses the importance of networking and making new connections, yet the elimination of these two programs was contrary to one of their missions.
- Feedback on Year 1 of IOM
I didn't like coming into the campus for 1 class on Sunday. We had to be there on Sunday. You h.a.v.e. t.o.b.e. there. But it's for 1 class, homeroom? Is there a way to push it back for homeroom at 1pm? I know that causes tension for volunteers, board of regents but is 1 hr on campus the best use of time? I'd rather go through homeroom and two classes or maybe one? I wish there was an all year networking event that Sunday night. I only met a few year 2 people, and I have no idea who is Year 3 or Year 4. Wednesday bash was slightly awkward as I sat there and clap and root for people, I never met, never connected with and probably never will. I wish there was networking event that Sunday night to meet people. I realize it's budget concern but surely the visitor's bureau would love to sponsor and welcome IOM to Philly? It can be simple with pizza, beer and wine, nothing fancy. I wish I would have known to bring a tumbler or two or ten to donate to this class. We made it work but it's on the things I wish I would have known to bring. My brain was fried by the 4 o'clock class. I'm typing up my takeaways from each class and I have nothing from my 4:15 Build Better Boards and Committees with [name removed], and I loved her Unleash the leader within class. She's a great teacher. I think from going so hard and so early, adult learners are different than student learners. So maybe pushing to having some classes on Sunday afternoon would help? Or maybe it's me and only brain didn't work at the 4:15 class. The content was amazing! Your faculty was awesome-sauce. [Name removed] was very helpful and gave real world examples. [Name removed] is simply a "guru" he is professional and approachable and explains why governance is the way it is. Associations of the future was thought provoking. [Name removed] was brilliant with her "what you mention gets attention" message and the power of influence. [Name removed] was my fav, by far. It instills such confidence and passion to get you confident, he is truly outstanding. [Name removed], Unleash the leader within blew me away with practical tips on "how -to", how to do deal with the thinkers vs feelers, how to do, deal with people who are "early bird" on projects vs. "late" "work well under pressure" people. Financial Fitness was good, but I also deal with the financials and our P & L and 990 so it's was good information for those who don't deal with it on a day-to-day-to basis. [Name removed] was good coach. [Name removed] was instrumental in changing my mindset of engagement is different than retention and her real world examples were very applicable. Overall it's a great IOM, I would consider going to Villanova next year. Thank you for all you do.

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- This year things seemed a little off compared to previous years. I mentioned things started rough with our advisor, so that may have been why it felt a little off. The lack of water/water bottle available was a bit unexpected. Several core classes seemed very basic, especially for third year. Times were too long for the content that was prepared. Overall I had a great experience and look forward to finishing up next year.
- Look at engaging new speakers.
- Coming in on Sunday for 1 hour of information that could be done in an email or 15 minutes on Monday morning seemed like a waste. If you're going to have people come in on Sunday, I would structure the evening like it was last year with a dinner for networking. Maybe a BBQ or cookout on campus, but something that doesn't seem like time wasted. The Wednesday night graduation was also lacking this year. By the time the 15 minutes "ceremony" and program was finished everyone was leaving. The music right away made it tough to enjoy dinner and talk to people at your table. Most of my class left by 8pm. The food was average at best as well. Going back to the previous years scheduling would be a benefit.
- Great speakers. Provided information that I can use with my Association. I'll be back next year.
- Great program. I got much information from the Governance, Finance and HR sessions. Most all the speakers were fantastic.
- One thing I felt was missing was a way for participants to connect to others in their specific field of non-profit work to allow them to focus development of their professional connections. For instance, creating a "membership services" network, or a "legal" network, or a "marketing" network, or an "executive director" network and allowing folks to join to get to know others in their specific fields a bit better.
- During graduation, it would have been nice to be able to sit with my closest peers as they live across the country and we don't have the availability to visit each other. And also it would be nice to have 2 entree options.
- I specified this on individual presenters, but please make sure the presenter is talking about what was advertised. There was one speaker who wasn't even close to the handouts or class description. Please have the auction items on a floor closer to where everyone can see the items.
- I would suggest an elective course on creating emergency preparedness plans for nonprofits and their member companies. I do this regularly for our organization and members, and it is very well received. This is getting more press and more attention in the trade publications. [Name removed] would be willing to come back and do a class at Institute on the subject.
- I'm not sure what I was expecting, but I was surprised at how much I learned. My only complaint is that it's a shame I'll have to wait three more years to learn all of it!

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- Recommendations for future first-year attendees: Sunday night needs to be an icebreaker of sorts. Maybe a scavenger hunt on campus then ending at a bar? The Bailey bar with the wall splitting the two sides was inconducive to networking. Make 1-1 and 1-2 feel like one class. One class getting shirts and the other class not getting shirts needs to be eliminated. Somehow need to get the first years connected before Thursday! Monday night first-year dinner - NEVER do that again. 3 hours to get served! And we only got to talk to the 4 people sitting around us. Needs to be a pay in advance thing, buffet situation where people can network and get to know each other. Maybe a forced networking game "find someone who is from your state, find someone from another state, find a different person who works in a chamber, find someone who likes the mountains, who likes dogs, etc" that sort of thing. Wed night - over explain the big bash to first years - it makes sense when you are there, but before that, why would I go? What's the big deal? At the big bash, while dinner is being served, background music only (no singing). It was WAY too loud for dinner, couldn't hear the person next to you! Also the banquet room needs to be at least 66 degrees BEFORE guests arrive. People were leaving early (just as they finished eating) b/c of how hot it was! And that was way before the dance floor heated up! Lastly, the connection that I made with my class was amazing, wish I had made more connections with the 1-1 class. I know you want to keep the class size down for the interactive parts, but if there is any way to combine some of the sessions, please consider with the attempt to merge the classes so they don't feel so separate. Maybe a dedicated place on the box lunch day for first years to hang out and talk with someone new. Overall AMAZING job!
- One instructor in particular (an attorney) wasn't very sensitive to his audience, calling the 1 in 5 people in who have mental illnesses "nut jobs." He also talked about destroying evidence pertaining to one of his cases (the "Is this Legal?" class). He was the only less than bright spot in my experience. I do think the staff, board of regents and volunteers do a tremendous job at providing information that has real value in our organizations, and I know I have personally grown in my profession as a direct result of my experiences and education at Institute. Keep up the good work!
- I was disappointed in the Graduation ceremony. In comparison to last year it felt as it was not treated as important. The food was not impressive at all and the overall organization felt very off. It would have been nice to have the classes sit together with table assignments and it felt very rushed. It was much more organized and impressive in 2017.
- Would have been nice to include all states in the photo opp, even if there was only one representative... didn't attend the big bash but heard several negative comments from attendees... suggest BidPal or similar app for the auction, so that people can bid whenever and where ever they want.

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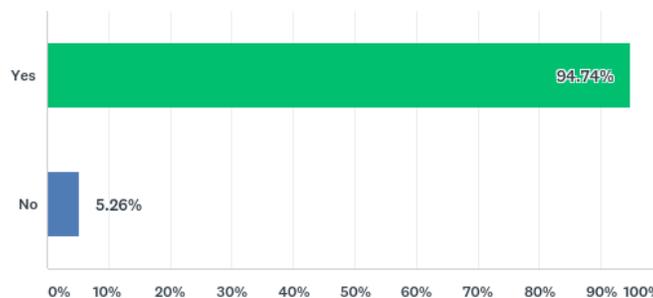
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- I think it is time to do an instructor refresh. You have many talented staff, but now that I am my third year and have had [name removed] three times, [name removed] four times, and [name removed] three times, there is a tremendous amount of redundancy in their classes, even though they are on different topics. This year, the course work wasn't new and innovative, it was almost like a repeat of previous years. Also, I think eliminating the opening night reception is a mistake. That event was so great for laying the groundwork for the week.. tremendous networking and as a first year, a great way to feel welcomed.
- Hands down, IOM is the best combination of high performing people and good quality curriculum I've encountered in 30 years of business. I was skeptical at first but now I'm a convert.
**Important for the credibility of the teachers and the Institute: almost every slide deck had spelling errors. The first was excusable... second, third... not so much. Easy fix, but worth the effort.
- My one biggest let down over the 4 years of Institute was not having the Kickoff on Sunday. I felt this year I did not get a chance to meet and mingle with the first years or other classes. It was also during that event that time of recognizing the 4th years that we didn't get to do that I saw in years past and was looking forward to.
- As a second year student, it would have been nice to have some sort of gathering after homeroom on Sunday. It would have been an opportunity also for us to meet the other 2nd year class. Some chose not to attend the Big Bash or to go out to dinner after the graduation. Perhaps you should ask if they plan to attend so that your aren't paying for meals that are not needed.
- As a 4th year student I thought this year the institute lacked service on a couple of things. The kickoff on the first night was not there and that's always good to meet with the other classes as well. The snacks during the breaks were a lot cheaper than what we used to get in the prior years. The big bash was not great, we have had much better ones in the years before. I just felt like we were second class citizens. The cutting of some of the nicer things was not good.

Q17 Did you leave Institute with at least three or more ideas / takeaways to bring back to your organization?



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