



TABLE OF CONTENTS

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

INSTITUTE FOR ORGANIZATION MANAGEMENT
WINTER BOARD MEETING
FEBRUARY 5, 2019

Contents:

1. Board of Trustees Roster
2. Agenda
3. Fall Meeting Minutes
4. Nominations
5. Program Updates
6. Boards of Regents' Reports
7. Demographics
8. Winter Institute Survey Results and Feedback



BOARD OF TRUSTEES

2019 ROSTER

CHAIR

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: 2018-2019

VICE CHAIR

Matt R. McCormick, IOM, CCE
President
Columbia Chamber of Commerce
300 South Providence Road
Columbia, MO 65205
573-817-9108
mmccormick@columbiamochamber.com
Term: 2018-2019

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

Steve Clark, IOM, J.D., CFE

President and CEO
Fayetteville Chamber of Commerce
PO Box 4216
Fayetteville, AR 72701
479-521-1710
sclark@fayettevillear.com
Term: 2018-2019

CHAIR ELECT

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: 2018-2019

PAST CHAIR

Chris E. Wallace, IOM, CCE
President and CEO
North Texas Commission
8445 Freeport Parkway, Suite 640
Irving, TX 78701
469-359-5336
chris@ntc-dfw.org
Term: 2018-2019

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: 2017-2020

Kimberly Dahlsten, IOM

Vice President of Operations
Catawba County Chamber of Commerce
1055 Southgate Corporate Park, SW
Hickory, NC 28601
828-431-7230
kdahlsten@catawbachamber.org
Term: 2018-2019



BOARD OF TRUSTEES

2019 ROSTER

Tony Felker, IOM, CCE

President and CEO
Frisco Chamber of Commerce
6843 West Main Street
Frisco, TX 75034
972-335-9522
tfelker@friscochamber.com
Term: Through 2019

Mark L. Field, IOM, CCE

Senior Vice President of Membership
Knoxville Chamber of Commerce
17 Market Square #201
Knoxville, TN 37902
865-246-2607
mfield@knoxvillechamber.com
Term: 2018-2020

David Johnson, IOM, CAE

Vice President, Membership and Volunteer
Engagement
Association of Women's Health, Obstetric and
Neonatal Nurses
1800 M Street, NW, Suite 740 South
Washington, DC 20036
202-261-2454
djohnson@awhonn.org
Term: 2015-2019

**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: Through 2019

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: Through 2019

Jack Lank, IOM

President and CEO
The United Regional Chamber of Commerce
310 South Street
Plainville, MA 2762
508-316-0861
jack@unitedregionalchamber.org
Term: 2017-2020

Kelle Marsalis, IOM, CCE

Vice President
Plano Chamber
5400 Independence Parkway, Suite 200
Plano, TX 75023
972-345-8416
kellem@planochamber.org
Term: 2016-2019

Crystal Moore, CAE

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



BOARD OF TRUSTEES

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

2019 ROSTER

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

President
New Hampshire Automobile Dealers
Association
PO Box 2337
Concord, NH 03302
603-224-2369
pmcnamara@nhada.com
Term: Through 2019

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: 2018-2020

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

President
Richland Area Chamber of Commerce
55 North Mulberry Street
Mansfield, OH 44902
419-522-3211
JPerry@RichlandAreaChamber.com
Term: 2018-2020

Gene Terry, IOM, CAE

Executive Director, American Society of Hand
Therapists
Association Headquarters, Inc.
1120 Route 73, Suite 200
Mount Laurel, NJ 08054
856-380-6840
gterry@ahint.com
Term: 2018-2019

Raymond P. Towle, IOM, CAE

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

Scott Waller, IOM

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

Angela Whitcomb, IOM

President
Shakopee Chamber of Commerce
1801 East County Road 101
Shakopee, MN 55379
952-445-1660
awhitcomb@shakopee.org
Term: Through 2019

BOARD OF TRUSTEES AGENDA



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

2019 WINTER MEETING

FEBRUARY 5, 2019
11:30 A.M.–1:00 P.M. EST
CONFERENCE CALL

I. Welcome and Introductions

Megan Lucas, IOM, CCE, CEcD

Chair, Institute for Organization Management

CEO and Chief Economic Development Officer, Lynchburg Regional Business Alliance

II. Approval of Minutes – October 5, 2018

III. Approval of Nominating Committee Report

IV. Program Updates

- a. Marketing
- b. Social Media
- c. Scholarships and Fundraising
- d. Winter Geographic Breakdown
- e. Curriculum
- f. ASAE and ACCE Partnerships

V. Boards of Regents' Reports

- 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

VI. Chairman's Report

VII. Other Business

VIII. Adjournment

Next In-Person Meeting: October 4, 2019 in Washington, D.C.

BOARD OF TRUSTEES AGENDA



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

FALL 2018 MEETING MINUTES

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

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; Catherine S. Dority, IOM; David Johnson, IOM, CAE; Dawn Johnson, IOM; Nick Kieffer, IOM, CP; Jack Lank, IOM; Kelle Marsalis, IOM, CCE; Matt R. McCormick, IOM, CCE; Carrie Stuart, IOM; Scott Waller, IOM; Raymond P. Towle, IOM, CAE; Karyn K. MacRae, IOM, CAE, CMP; Caitlin Gayles; Katelynne G. Cox; Andrew Y. Weller, IOM; Megan Kastner

Not in attendance: Bryan Daniels, IOM, CCE, CEcD; Brad Lacy, IOM, CCE; Timothy M. McKee, IOM; Crystal Moore, CAE

Observers: Peter J. McNamara, IOM, CAE, J.D.; Angela Whitcomb, IOM

I. Welcome and Introductions

Chris E. Wallace, IOM, CCE welcomed everyone to the meeting and introductions were made. Recognition was given to the incoming Board of Regent chairs who were invited to observe the meeting.

II. Approval of Minutes

The February 6, 2018 minutes were unanimously approved.

III. Approval of Nominating Committee Reports

The Board of Trustees, Curriculum Committee, Midwest Board of Regents, Southeast Board of Regents, and Northeast Board of Regents nominating committee reports were all approved with no changes. The West Board of Regents nominating committee report was approved with an amendment (included below).

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

BOARD OF TRUSTEES AGENDA



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

FALL 2018 MEETING MINUTES

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

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

Christine Kennedy, IOM, CCE, CPC, ELI-MP
COO and Executive Vice President
Lynchburg Regional Business Alliance
Lynchburg, VA
Term: Through 2019

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

Angela Whitcomb, IOM
President and CEO
Shakopee Chamber of Commerce
Shakopee, MN
Term: Through 2019

Curriculum Committee Chair:

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

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

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

BOARD OF TRUSTEES AGENDA



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

FALL 2018 MEETING MINUTES

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)*

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

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

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

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

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

BOARD OF TRUSTEES AGENDA



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

FALL 2018 MEETING MINUTES

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

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

Robert Medler, IOM
Vice President, Government Affairs
Tucson Metro Chamber
Tucson, AZ
Term: 2018-2019 (*confirmed February 6, 2018*)

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

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

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

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

BOARD OF TRUSTEES AGENDA



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

FALL 2018 MEETING MINUTES

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

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

Nick Kieffer, IOM, CP
President and CEO
Goshen Chamber of Commerce
Goshen, IN
Term: 2017-2018 (*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

Peter J. McNamara, IOM, CAE, J.D.
President
New Hampshire Automobile Dealers Association
Concord, NH
Term: 2017-2018

Angela Whitcomb, IOM
President and CEO
Shakopee Chamber of Commerce
Shakopee, MN
Term: 2017-2018

Faculty Member (two-year term):

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

MIDWEST BOARD OF REGENTS

Chair

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

BOARD OF TRUSTEES AGENDA



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

FALL 2018 MEETING MINUTES

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

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

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

SOUTHEAST BOARD OF REGENTS

Chair

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

BOARD OF TRUSTEES AGENDA



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

FALL 2018 MEETING MINUTES

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

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

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

BOARD OF TRUSTEES AGENDA



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

FALL 2018 MEETING MINUTES

ROTATING OFF BOARD

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

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:

Mike Greene, IOM
Senior Vice President, Government Affairs
Council for Responsible Nutrition
Washington, DC
Term: 2018-2020

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

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

BOARD OF TRUSTEES AGENDA



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

FALL 2018 MEETING MINUTES

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

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

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

BOARD OF TRUSTEES AGENDA



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

FALL 2018 MEETING MINUTES

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

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

IV. Consent Agenda

The Winter Board of Regents, Midwest Board of Regents, Southeast Board of Regents, West Board of Regents, and Northeast Board of Regents Chairman's reports were all approved.

V. Curriculum Committee Report

Jeremy Arthur, IOM, Chair of the Curriculum Committee, gave an update on yesterday's Curriculum Committee meeting. The new elective focusing on diversity, equity, and inclusion was brought to attention. The following changes were unanimously approved and will be implemented in 2019.

2018 Curriculum Changes

The Curriculum Committee approved the following changes to the curriculum. These changes will go into effect beginning at 2019 Winter Institute with the exception of a new elective proposed, which will go into effect beginning in 2019 summer. There were a number of changes made to small sub-bullet points and percentages, but those changes do not need to be approved by the Board of Trustees. All approved changes including sub-bullet point changes will be reflected in the 2019 syllabus.

E161 Business Communication Technology Trends

- The Curriculum Committee has decided to remove this course in order to strengthen our portfolio of current technology courses and avoid overlap. Certain course points were moved into other classes including *C260 Marketing Strategies* and *C460 Integrating Strategic Technology Solutions*.

BOARD OF TRUSTEES AGENDA



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

FALL 2018 MEETING MINUTES

C260 Marketing Strategies

Objective Change: Two of the sub-bullets within the second course objective were moved into the first course objective.

- New sub-bullets:
 - Enhance methods to distribute your “product” by building awareness and visibility of the organization through marketing and communications.
 - Embrace member and market research as a key organizational driver.

Objective Change: The third course objective now includes information from *E161 Business Communication Technology Trends* that pertains to social media outlets and tools.

- New sub-bullet: Use technology in marketing communications (brief lead-in to *C460 Integrating Strategic Technology Solutions*) including social media outlets and tools, as well as, traditional media.
- New sub-bullet: Understanding analytics
- New sub-bullet: Recognizing how your target audience utilizes your social media

C460 Integrating Strategic Technology Solutions

Objective Change: The sub-bullet within the first course objective now includes “e-commerce” as a technology tool set.

- New sub-bullet: Understanding the technology tool set, integration (i.e. CMS, CRM, ERP, e-commerce, and SM, etc.) and how it is needed to support association goals and activities

Objective Change: The second and third objectives were re-ordered to weight the objectives and align with the course description.

- New objective order: 2. Protecting and maintaining your technology solutions.
3. Developing technology strategies for your organization

Objective Change: An additional sub-bullet was added within the second course objective to include cloud technology and cyber security.

- New sub-bullet: Cloud technology & cyber security.

Objective Change: The sub-bullet within the third course objective was changed to include “scalability” and add an instructor note about open dialogue.

- New sub-bullet: Best practices & scalability (instructor note: open dialogue encouraged)

C360 Innovate or Die

Title Change: The title of the course has been changed from “Innovate or Die” to “Culture of Innovation” to highlight the importance of creating a culture of innovation within your organization.

Objective Change: Three of the sub-bullets from the first course objective were moved into *C230 Managers Who Motivate* and the additional smaller sub-bullets were moved into faculty notes to streamline the syllabus.

- Sub-bullets for the first course objective are now:
 - Balanced blend of methodologies, work practices, culture, and infrastructure
 - Embraces risks and wild ideas and tolerates the occasional failure
 - A culture of people first

Objective Change: The sub-bullet pertaining to “Monitoring revenue supply” was moved from this class to *E110 Revving Your Revenue Stream*.

BOARD OF TRUSTEES AGENDA



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

FALL 2018 MEETING MINUTES

Objective Change: The third course objective was moved to *E110 Revving Your Revenue Stream* and replaced with a new course objective.

- New course objective: Innovate or Die

C230 Managers Who Motivate

Objective Change: The second course objective now includes sub-bullets from *C360 Culture of Innovation*

- New sub-bullets:
 - Allows time for brainstorming, creativity, and innovation
 - Develops and honors talent, not seniority
 - Strives for, measures, and exceeds quality expectations

E340 501(c)(3) Foundations

Course Description: The course description was changed by the committee to note this class is for attendees who already have a foundation in place.

- If you currently have a foundation, you need to be fully cognizant of how to make this powerful arrangement work. Explore issues associated with IRS governance and compliance, as well as accounting and audit rules impacted by received restricted funds from contributions and grants.

Objective Change: The sub-bullet “Why Start a Foundation” within the first course objective was removed.

Bonus Session Proposed: A bonus session focused on creating a foundation was suggested in order to gather data and better develop a portfolio of foundation related courses.

E150 Diversity, Equity, and Inclusion

New Elective Proposed

Course Description: Inclusive leadership is paramount to successful organizations and thriving communities. Equip yourself with the tools necessary to create a community that is welcoming to all.

Course Objectives:

- **Understanding the economic impact of diversity, equity, and inclusion.**
 - 20%
 - Exploring identity groups and the collective impact of partnership
 - Associations and chambers centered on identity
- **Creating a climate that promotes an understanding and respect for diversity, equity, and inclusion.**
 - 40%
 - Recognizing unconscious bias
 - Launch and sustain an impactful initiative
 - Intentional leadership
 - Personal impact of exclusion
 - Analyzing programs, products, and communications for alignment

BOARD OF TRUSTEES AGENDA



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

FALL 2018 MEETING MINUTES

- **Using policy to support the organization’s goal of diversity, equity, and inclusion.**
 - 40%
 - Analyzing company policies for unconscious bias
 - Creating, implementing, and communicating a DEI policy to your organization (staff and board) and community.

VI. Updates

a. Opening Kickoff Session

Chris Wallace, IOM, CCE informed the group that based on feedback received over the summer, the speaking portion of the Opening Kickoff Session will return in 2019. It was explained that while volunteers will still have an opportunity to introduce themselves, staff will work with regents to be more intentional with the agenda, ensuring that the role of the Board of Regents is explained and expectations for the week are clearly defined. Regents are encouraged to further develop an optional event on Sunday evening.

It was also noted that staff is currently exploring the possibility of partnering with a local restaurant/bar for a scholarship fundraiser during this time.

b. West Institute and ACCE

Staff provided an update on 2019 West Institute and ACCE, sharing that word was recently received from the university that the new proposed dates of Wednesday, July 17 – Sunday, July 21 were approved. The dates were changed to avoid direct overlap with ACCE’s conference in California.

c. 2019 Winter Institute

Staff provided an update on 2019 Winter Institute and the University of Arizona. The group learned that the University of Arizona is no longer able to host the program on campus in 2019 due to a change in their academic calendar. As a result, Winter Institute will take place at the Marriott, which is the host hotel. There was discussion about the importance of managing attendee expectations, as well as the potential of moving sites in the future.

d. Diversity Taskforce Update

Megan Lucas, IOM, CCE, CEcD, presented the proposed Diversity and Inclusion Statement, and suggested that the title be amended to Diversity, Equity, and Inclusion Statement to align with the new elective. A suggestion was made to add “Visual marketing collateral should showcase the spirit of the statement” to the statement and a motion was passed to accept the statement as written below.

Diversity, Equity, and Inclusion Statement

The U.S. Chamber of Commerce Foundation’s Institute for Organization Management (Institute) program values diversity and practices inclusion within the association and chamber and industries. For the continued advancement of the Institute program, we champion equal access and equity of opportunity through the intentional inclusion of all. Further, we encourage and provide leadership and resources to our

BOARD OF TRUSTEES AGENDA



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

FALL 2018 MEETING MINUTES

association and chamber professionals so they can create D, E, & I programs and initiatives at their own organizations.

Institute for Organization Management values diversity and inclusion across identity groups and professional levels. Identity groups include and are not limited to age, appearance, disability, ethnicity, gender (identity or expression), geographic location, nationality, professional level, race, religion, and sexual orientation.

Condensed Version for Collateral

Institute for Organization Management values diversity and practices inclusion for the advancement of the program. Institute's National Board of Trustees provides leadership and commits time and resources to champion equity through the intentional inclusion of all.

Changes and Ideas to Implement

1. Include the statement in Institute's Policies and Procedures to apply to any situation involving bias, harassment, or discrimination.
2. Conduct one training per year for Institute Board of Trustees and Boards of Regents to help their personal and professional growth.
3. Add a course to the curriculum about diversity and inclusivity.
4. Incorporate the statement in recruitment messaging.
5. Add measures to track benchmarks and progression.
6. Create a challenge that Institute holds themselves accountable to and strives for.
7. Ensure that marketing and visual collateral reflects the spirit of the statement.

VII. Chairman's Report

The chairman thanked all of the volunteers for their roles in a successful 2018 year and welcoming him to each site. In addition, he specifically mentioned:

- 2018 final enrollment
 - 253 first-years
 - 882 overall
- 2019 attendance goals. He recognized that these are based on real data from the past five years. The first-year projections include a 5% increase in order for Institute to strive to continue to grow the program.
 - 265 first-years
 - 859 overall
- He recognized and thanked all volunteers, giving special recognition to the 2018 Boards of Regents Chairs:
 - Winter: Stephanie Parton (no longer on the BOT due to Winter's different term schedule; 2019 chair Nick Kieffer was in the room)
 - Midwest: Dawn Johnson
 - Southeast: Bryan Daniels
 - West: Brad Lacy
 - Northeast: Carrie Stuart

BOARD OF TRUSTEES AGENDA



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

FALL 2018 MEETING MINUTES

VIII. Looking Ahead

Megan Lucas, IOM, CCE, CEcD recognized and thanked Chris E. Wallace, IOM, CCE for his year of service as Board of Trustees Chairman and presented him with the Chairman's award. She spoke about the focus and vision for 2019, highlighting first-year recruitment and word-of-mouth marketing. She also challenged everyone to thank the person who introduced them to Institute.

IX. Other Business

Discussion regarding fundraising goals took place, and the board was challenged by fellow trustee DJ Johnson, IOM, CAE to exceed Institute's goals through contributions.

A larger discussion regarding potential partnership opportunities amongst West Institute and ACCE took place. Trustees were also encouraged to consider all sites when sending their staff and promoting the program.

X. Adjournment

The Board of Trustees were thanked for their participation and their time. Past chair Joe Henning, IOM, CAE, ACE was recognized and thanked for his service, in addition to all other trustees rotating off the board. It was reported that the next meeting will take place via conference call on Tuesday, February 5, 2019 at 11:30 a.m. EST and the next in-person meeting will take place on Friday, October 4, 2019 in D.C.

There being no other business the meeting was adjourned at 9:30 a.m.



NOMINATIONS

2019 BOARD OF TRUSTEES

NEW TRUSTEE

Robert Medler, IOM
Vice President, Government Affairs
Tucson Metro Chamber
Tucson, AZ
Term: Through 2020

ROTATING OFF

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



NOMINATIONS

2019 CURRICULUM COMMITTEE

NEW MEMBER

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

ROTATING OFF COMMITTEE

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



NOMINATIONS

2020 WINTER BOARD OF REGENTS

Chair

Robert Medler, IOM
Vice President, Government Affairs
Tucson Metro Chamber
Tucson, AZ
Term: 2019-2020

Vice Chair

Mike Hofman, IOM
Executive Director
Orange City Chamber of Commerce
Orange City, IA
Term: 2019-2020

Past Chair

Nick Kieffer, IOM, CP
President and CEO
Goshen Chamber of Commerce
Goshen, IN
Term: 2019-2020

The following individual is nominated:

Robert Wiggans, IOM, CAE
Senior Director of Membership
Wine & Spirits Wholesalers of America
Washington, DC
Term: 2019-2021

Term Renewals (two-year term):

Steven Baas, IOM, CCE
Vice President for Government Affairs
Metropolitan Milwaukee Association of Commerce
Milwaukee, WI
Term: 2015-2021

Erin Carney, IOM
President
Metrocrest Chamber of Commerce
Carrollton, TX
Term: 2017-2021



NOMINATIONS

2020 WINTER BOARD OF REGENTS

Rudy P. Flores, IOM
Executive Director
Lincoln Square Ravenswood Chamber of Commerce
Chicago, IL
Term: 2017-2021

Steve Halter, IOM, EDFP, PCED
President
Greater Poplar Bluff Area Chamber of Commerce
Poplar Bluff, MO
Term: 2015-2021

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, CCE
Executive Director
Marshalltown Area Chamber of Commerce
Marshalltown, IA
Term: 2017-2019

REMAINING ON BOARD, NO ACTION REQUIRED

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

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



NOMINATIONS

2020 WINTER BOARD OF REGENTS

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

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

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

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

ROTATING OFF BOARD

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



PROGRAM UPDATES

MARKETING

While it is only the start of 2019, Institute's marketing efforts have been advanced through the hard work and collaboration of volunteers and Institute staff. We appreciate the social media interactions, helping us spread our messaging, and recruiting new attendees for the program each year. Our goal is to create new messaging and outlets for promotion of the organization in addition to sustaining successful practices from past years.

Advertisements:

- *Chamber Executive* magazine has been an important medium for us to advertise Institute testimonials and upcoming registration dates. Multiple half-page and full-page ads have been placed in the magazine.
- A banner advertisement is now on the ASAE website from January through March. This ad includes registration information and a list of the Institute summer sites, dates, and locations. The ad links back to institute.uschamber.com/register.
- Our "scholarship stuffer" postcard was updated with the new 2019 summer sites and 2020 Winter Institute dates, and placed in the post-site thank you letters sent to Institute attendees. This card is also included in conference shipments and other meeting materials.
- The Institute planner is our largest and most prominent advertisement. It is distributed to all Institute attendees at site registration and is also included in conference shipments around the country this summer.

Promotional Materials:

- Institute will continue to send blue tablecloths with our logo and hashtag to different conferences, such as W.A.C.E., MAKO, and ACCE where we have an on-site staff presence.
- The charcoal-colored water bottles given to attendees with their planner during Winter Institute registration were well received and we decided to go back to that giveaway from the tote bags after reviewing attendee surveys.
- Institute screen cleaners continue to be a valuable marketing tool featuring both association and chamber testimonials. They are high-quality, unique items, and printing them in full-color makes them an attractive collateral piece. We are in the process of creating new designs for these in 2019.

Further Marketing:

- The #TestimonialTuesday social media posts are a weekly post we plan to continue. These give prospective attendees insight about what the program is like and what past attendees have gained from the experience.
- We saw much success with the #SessionSpotlight campaign supported by high engagement numbers. This insightful campaign highlighted Institute classes and gave an inside look at what the classroom experience was like. In 2019, we will run a campaign #ROIInstitute, which features attendee testimonials that reflect the usage of Institute-learned skills and what the true ROI for Institute education means.



PROGRAM UPDATES

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

SOCIAL MEDIA

	2018*	2019*	Percentage Increase
Facebook	2,772 Likes	3,050 Likes	10%
Twitter	1,787 Followers	1,878 Followers	5%
LinkedIn	2,383 Members	2,454 Members	3%
Instagram	412 Followers	509 Followers	24%

**Numbers as of January 24*

On-site Social Media 2019

Winter Institute

238 attendees
Tucson, Arizona
January 6-10



815

Engaged users on Facebook
vs. 970 in 2018



23

#IOMeducates Tweets
vs. 58 in 2018



17

#IOMeducates
Instagram Posts
vs. 44 in 2018



21

New Likes
vs. 22 in 2018



Weekly Total Facebook Reach=

5,731

vs. 4,445 in 2018



PROGRAM UPDATES

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

SCHOLARSHIPS AND FUNDRAISING

FUNDRAISING

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
#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

2020	Winter	Midwest	Southeast	West	Northeast	Total
Funds remaining from previous year's scholarship allocation	\$1,879.67					\$1,879.67
Silent auction	\$10,707.28					\$10,707.28
Additional on-site fundraising	\$1,602.29					\$1,602.29
#GivingTuesday	\$510.00	\$1,455.00	\$ 225.00	\$ 540.00	\$0.00	\$2,730.00
Donate Now						
\$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 2020 sites:	\$15,699.24	\$2,455.00	\$1,225.00	\$1,540.00	\$1,000.00	\$21,919.24

- An internal change was made resulting in Giving Tuesday funds shifting to impact the following year. Therefore, all donations made on Giving Tuesday 2018, will be available for use in 2020.
- Registration donations for scholarships are now split evenly across sites.



PROGRAM UPDATES

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

SCHOLARSHIPS AND FUNDRAISING

2019 STATE PARTNERSHIP SCHOLARSHIPS

SPS Organization	Attendee Organization	Site
Oklahoma Chamber Executives	Lawton Fort Sill Chamber (OK)	Winter
South Dakota Chamber of Commerce and Industry	Pierre Area Chamber of Commerce	Midwest
Mississippi Economic Development Council	Tate County EDF	Southeast
Mississippi Economic Development Council	Jones County Chamber of Commerce	Southeast
Virginia Association of Chamber of Commerce Executives	Fredricksburg Regional Chamber	TBD
Virginia Association of Chamber of Commerce Executives	Harrisonburg-Rockingham Chamber	TBD
Virginia Association of Chamber of Commerce Executives	Greater Bluefield Chamber	TBD
Virginia Association of Chamber of Commerce Executives	Chesterfield Chamber	TBD
Illinois Association of Chamber of Commerce Executives	Niles Chamber of Commerce & Industry	Midwest
Illinois Association of Chamber of Commerce Executives	Morton Chamber of Commerce	Midwest

- Five of our SPS partners plan to send a total of ten people to 2019 Institute sites.



PROGRAM UPDATES

CURRICULUM

New App Implementation

This year, IOM used a new app platform called CrowdCompass. CrowdCompass connects directly with our registration platform, Cvent and allows each attendee to have their personalized schedule within the app. With CrowdCompass, we were able to forgo printing paper schedules and complete elective changes in person. Despite a few individual technical difficulties, the app has received positive reviews from our attendees and had a high adoption rate. We look forward to implementing the feedback and using the app for our summer programs.

Course Evaluation

Below is an example of a course evaluation that our attendees see for each class they take:

To assist Institute in its commitment to continuous improvement, please answer the following questions on a scale of 1-5 (1 being poor- 5 being excellent):

About the Instructor

- I would recommend this instructor to teach this course again.
- The instructor welcomed questions, encouraged participation, and stimulated my interests.
- The instructor tailored this course to the nonprofit industry.

About the Course

- The information presented in this course is valuable to my continuing education.

Open Ended Question: Please comment on the following: a) specific strengths of the instructor; b) specific areas of improvement for the instructor; c) areas of improvement for the course. Please be thoughtful, professional, and constructive in your feedback.

Course Audits

The courses audited for 2019 Winter Institute were:

- C260 Marketing Strategies
- C360 Culture of Innovation
- C460 Integrating Strategic Tech Solutions

Curriculum Changes

The new elective, E150 Diversity, Equity, and Inclusion which was created and approved last fall, is included as a part of the 2019 summer elective offerings.

BOARD OF REGENTS REPORT



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

WINTER CHAIRMAN'S REPORT, 2019 WINTER

What a great week for 2019 Winter! The Board of Regents would first like to thank and commend Raymond, Karyn, and the rest of the Institute staff. There were many challenges that came with Tucson this year, and the team worked tirelessly to position the Board of Regents for success.

Next, I would like to recognize and thank the entire Winter Board of Regents. All 18 members of our board were able to be on-site this year, and the teamwork and comradery made for an enjoyable and effective week. The team was able to handle our situations and divide up the week's workload with maximum effectiveness.

We set our 2019 goals at some aggressive levels. Our overall goal for attendees was 240, the first-year attendee goal was set at 63, and an on-site fundraising goal was set at \$10,000. We also continued our 5kish Fun Run/Walk this year. We just missed our overall goal this year, ending with 238 attendees, but we exceeded our first-year goal by having 64 attendees. We did very well in our fundraising efforts. Our Silent Auction raised \$10,707.28, and we had 58 attendees participate in the 5kish Fun Run/Walk in 2019, which raised \$1,212.29. On top of this, additional donations were made, as well as carryover from last minute cancellations.

Several years ago, the Winter Board Chair instituted a weekly email to the full Board of Regents throughout the year to encourage engagement amongst the regents. This year, the email was titled the "Hump Day Report," sent every (maybe not every week, but consistently enough) Wednesday. Topics early in the year focused on recruitment efforts or reminders about getting information out through state conferences. This procedure will continue moving forward to keep Institute at top of mind with the Board of Regents as the year goes on.

With the location changes that were made for the classrooms, our biggest success this year was our communication with our attendees throughout the week. The Board of Regents focused the message on the experience of Institute, the culture of Institute, and the information you gain from Institute. We stressed this at registration, at the Kickoff, and throughout the week.

The Winter Board of Regents would also like to extend a big thank you to Trustee Chairwoman Megan Lucas for being on-site during the week. Having the Trustee Chair on-site set the tone for our regents and advisors and ensured a great week.

I would like to end this report by thanking everyone for the opportunity to Chair the Winter Board of Regents. The Institute program has been essential to my personal and professional growth, and it was an honor to serve and be able to give back.

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

BOARD OF REGENTS REPORT



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

MIDWEST CHAIRMAN'S REPORT, 2019 WINTER

The Midwest Board of Regents is looking forward the 2019 program. New board members bring even more life and energy to the very active and committed board members, and we all look forward to continuing to make that week in June the best experience for all. Our continued focus is on recruitment & retention, fundraising, and customer service.

The 2019 official attendance goals, 132 overall and 38 first-years, are much lower than our goals were last year. This was disappointing to us as a board, so we have committed as a group to beat that goal by 10%, which puts our new goal at 145 with 42 first-years. This is going to take some very intentional recruitment by us. We've begun that work by doing the following:

- Reaching out to associations in our respective states and making personal recruitment calls or visits and sharing association specific testimonials with them.
- Continuing to work with our state chambers executive organizations to promote Midwest IOM at conferences and to their members.
- Reaching out to the names on the prospect list. There are two possible positive outcomes of this: first one being we bring in new attendees this year, and the second is we help update the list to "real prospects" and we bring in new attendees for ALL sites in the years to come.
- Having each board member make 5 personal asks from their states.

Another continued area of focus is fundraising. We as a board realized through feedback that we have developed a reputation for "nickel & diming" our attendees each June. Understanding that we don't want to live up to that reputation, but that we NEED to raise funds for scholarships, I challenged each of the board members to donate \$106 each on Giving Tuesday, to raise enough money for one full ride scholarship. We were successful in that effort, meeting our goal. We are reaching out to our respective classes to continue to push for donations to our site, as well as asking for silent auction items that will "raise the bar" from the traditional auction items.

Attendee engagement is pretty strong in Madison, as our classes seem to connect with one another very well, and also co-mingle with the other classes very well. This year to enhance the attendee experience we are adding an optional networking/learning session after class on Tuesday. We will offer a casual setting (study pub at one of the host hotels) for a 50 Ideas in 50 Minutes session facilitated by a board member. We will once again be holding an "unofficial" welcome reception for the first-years after the Kickoff event to ensure that our first-years have an opportunity to connect before class on Monday. We did this last year and it was a great success.

This board has always seen the value in staying visible while on-site and connecting with the attendees. We have done a good job at being available and welcoming to the attendees by intentionally introducing ourselves and being visible at breaks, and socializing with the classes in the evenings. Our survey results show that this is appreciated and important to our attendees, and we will continue to make that a focus.

BOARD OF REGENTS REPORT



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

MIDWEST CHAIRMAN'S REPORT, 2019 WINTER

Social media is an area we need to put some extra effort into. We have a solid social media plan for consistently posting and driving timely messages from board members. Regent Jenna Armstrong has taken the lead on this the last few years, and it works well. Our challenge is getting our attendees to post. This year we are hoping to have a large screen in the break area with a rolling presentation of all posts/photos etc., to encourage more engagement from attendees.

The Class Advisors and Regent Partner team for 2019 Midwest is in the process of being confirmed. Vice Chair Jeff Griffin, IOM has put together a great team to lead the attendees in Madison, and he will be a great support to them on-site.

Submitted by: Angie Whitcomb, IOM
Chair, Midwest Institute Board of Regents

BOARD OF REGENTS REPORT



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

SOUTHEAST CHAIRMAN'S REPORT, 2019 WINTER

The Southeast Board of Regents is excited to promote and prepare for Southeast Institute in Athens. Our goals are 246 overall attendees and 86 first-year attendees.

As highlighted at our Fall Board Meeting, 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 will continue to engage with several national and state associations to encourage their membership to attend Southeast.

Additionally, we have charged our Board of Regents to emphasize the power of the personal story, because business IS personal. Institute IS personal. We have challenged 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 is meant to keep Institute top of mind for busy professionals and to cut through the "noise of mass communications." We believe Southeast is successful because we are warm, friendly, and personal and we model Southern Hospitality!

This outreach will include personal emails, phone calls, and tagging professional contacts on social media when regents tell a story. Several personal stories and photos are already popping up in Facebook profiles, which is very exciting.

I am very grateful for the opportunity to serve the U.S. Chamber Foundation, the Southeast Board of Regents, and the staff as Chair this year and look forward to delivering an outstanding 2019 Institute program in Athens.

Submitted by: Christine Kennedy, IOM, CCE, CPC, ELI-MP
Chair, Southeast Board of Regents

BOARD OF REGENTS REPORT



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

WEST CHAIRMAN'S REPORT, 2019 WINTER

West Institute had another great year in 2018, but we have more to do in 2019! The West Regents remain committed to growing the site and continuing our strong fundraising tradition. Our site offers participants a unique Institute experience. On behalf of the Board of Regents, I would like to update you on our progress since our October meeting in Washington, D.C.

The West Board of Regents' primary goals in 2019 include recruitment (with some twists), fundraising, and a continued emphasis on raising the "energy" during West Institute week.

ATTENDANCE GOAL: 95 TOTAL, 32 FIRST-YEARS

The board has a multi-faceted strategy to achieve our attendance goal of 95, with a "stretch goal" to exceed that number.

General Recruitment: We expect all of our board members to help in recruiting, using their network to find individuals for our first-year class, and encouraging diversity across all metrics. We had a good year in 2018 recruiting first-year members, and we want to continue this trend. We understand this is the secret for growing the site over the coming years.

Metro Chamber Recruitment: Last year's Chair, Brad Lacy, initiated a program of reaching out to mid-level managers/directors from metro chambers, and we want to continue on this focus. West Institute is one of the most diverse sites in terms of attendees, and we believe this provides an opportunity to recruit from all over the country to a unique destination.

Conflicts/Opportunities with ACCE in Long Beach: With ACCE holding their annual conference in Long Beach immediately before West Institute, we have challenges and opportunities. While a direct overlap with the ACCE conference was avoided, the back-to-back events provide an opportunity to bring more people to West Institute. What began as a conflict between the two organizations, has now evolved into a great opportunity to work together. ACCE and the U.S. Chamber are working jointly to cross-promote the two events, including a \$200 discount for those attending ACCE and then rolling up the road for West Institute. Board members will be working to spread the word and promote this opportunity. Special thanks to the U.S. Chamber staff for working through this challenging situation!

W.A.C.E. Academy: The Board will continue to communicate the value of the IOM experience to W.A.C.E. Academy graduates.

California Chamber/Association Recruitment: Of course, Texas continues to lead in the number of West attendees (yes, I am biased!), and we will continue to leverage our California resources to market the benefits of the IOM experience to local California chambers/associations.

Input from Board of Trustees: We would greatly appreciate any insight on what the Board of Trustees would like to see change at West to continue and grow this great site – "West is Best!"

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

BOARD OF REGENTS REPORT



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

NORTHEAST CHAIRMAN'S REPORT, 2019 WINTER

The Northeast Board of Regents has a goal of 146 overall attendees, 46 of which are first-years.

Regarding marketing and recruitment, the board has been tasked to contact their fellow chamber/association executives to encourage attendance, including sending their own staff. We will be sure to utilize IOM marketing materials and send program information to local chambers and state associations. Regents will continue to utilize fourth-years as Institute Ambassadors to welcome and assist new attendees. This not only helps with identifying future IOM leaders, but it also helps with retention.

Thinking strategically, we want to ensure attendees feel a cohesiveness amongst the classes by bringing back a networking function prior to the Big Bash, as well as a Sunday evening gathering.

In past years, our board had an active social media presence during the IOM week that encouraged both attendees and regents to post about specific classes. We are going to continue that week of social media moving forward. Last year, we organized "state photos" and encouraged attendees to post those pictures on their social media accounts.

Submitted by: Peter J. McNamara, IOM, CAE, J.D.
Chair, Northeast Board of Regents



DEMOGRAPHICS

2019 WINTER INSTITUTE

2019 Winter Institute 238 Attendees from 39 states and the District of Columbia

State, Number of Attendees, %

Alabama	2,	0.81%	Mississippi	1,	0.81%
Alaska	7,	2.80%	Missouri	10,	4.03%
Arizona	12,	4.83%	Montana	3,	1.21%
Arkansas	7,	3.25%	Nebraska	4,	1.61%
California	10,	4.20%	New Hampshire	1,	0.41%
Colorado	4,	1.61%	New Mexico	6,	2.42%
District of Columbia	22,	8.87%	North Carolina	4,	1.61%
Florida	3,	1.21%	Ohio	3,	1.21%
Georgia	1,	0.81%	Oklahoma	7,	2.82%
Idaho	6,	2.82%	Oregon	2,	0.81%
Illinois	11,	4.43%	Pennsylvania	1,	0.40%
Indiana	9,	3.63%	South Carolina	5,	2.02%
Iowa	6,	2.42%	South Dakota	1,	0.41%
Kansas	6,	2.42%	Tennessee	3,	1.21%
Kentucky	2,	0.81%	Texas	28,	11.70%
Louisiana	2,	0.81%	Utah	2,	0.81%
Maine	4,	1.61%	Virginia	11,	4.03%
Maryland	3,	1.21%	Washington	3,	1.21%
Michigan	8,	3.23%	Wisconsin	2,	0.81%
Minnesota	7,	2.82%	Wyoming	9,	3.63%

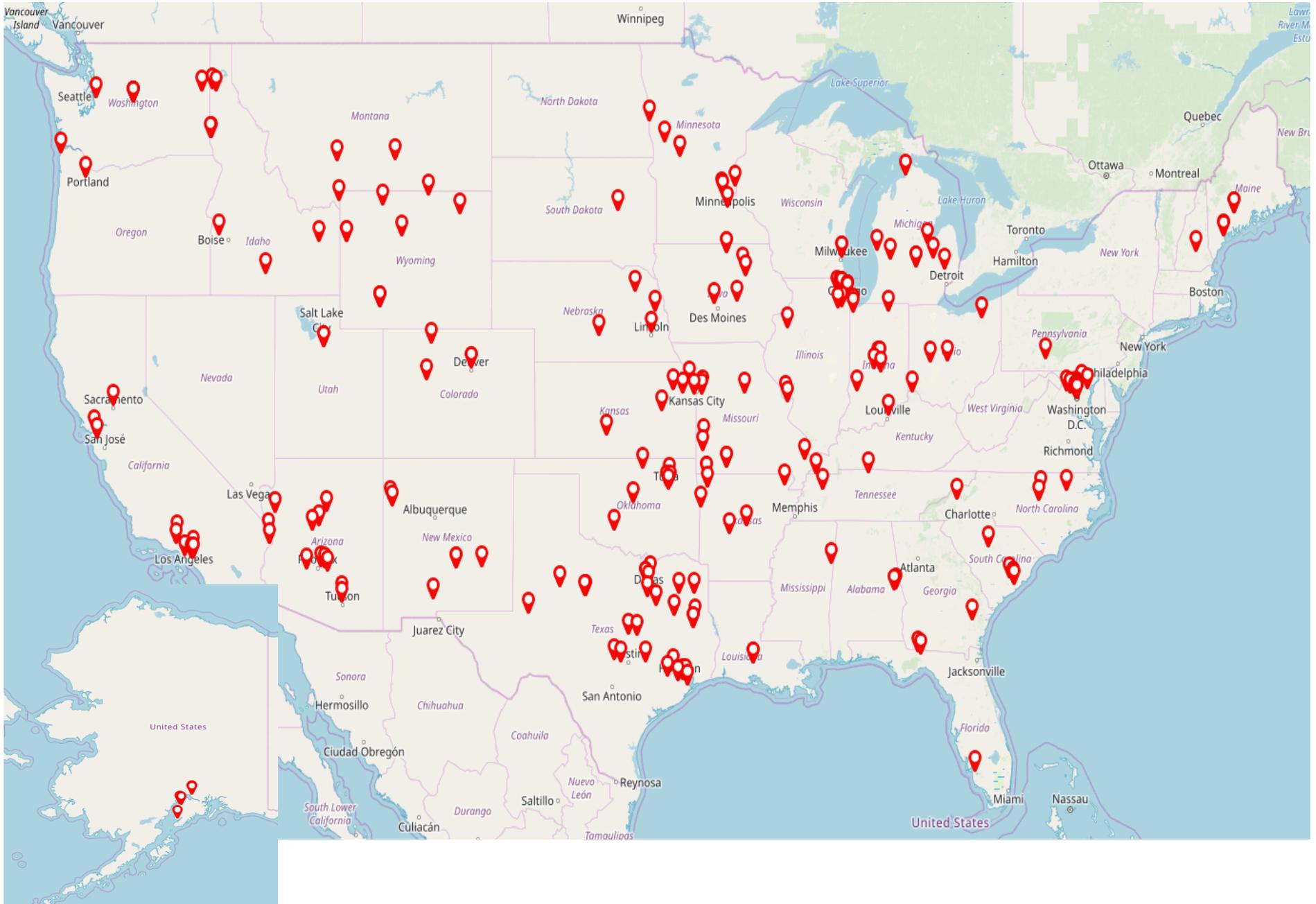
Top Increase Since 2018:

Maine	+4
South Carolina	+4

Most Attendees in 2018, Texas with 31

Most Attendees in 2019, Texas with 28

2019 Winter Institute Attendees





DEMOGRAPHICS

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

DEMOGRAPHICS BY SITE

Class Level	Midwest 2018	Southeast 2018	West 2018	Northeast 2018	Winter 2019
	1st year	25.68%	33.33%	31.96%	30.00%
2nd year	22.97%	25.42%	21.65%	22.00%	26.05%
3rd year	24.32%	19.17%	21.65%	24.67%	21.37%
4th year	27.03%	22.08%	24.74%	23.33%	23.79%

Employer	Midwest 2018	Southeast 2018	West 2018	Northeast 2018	Winter 2019
	Association	28.38%	9.58%	23.71%	48.67%
Chamber	66.22%	86.67%	72.16%	40.67%	61.69%
Other	5.41%	3.75%	4.12%	10.67%	10.08%

Age	Midwest 2018	Southeast 2018	West 2018	Northeast 2018	Winter 2019
	21 – 30	16.89%	19.58%	14.43%	14.67%
31 – 40	35.14%	30.00%	35.05%	38.67%	29.83%
41 – 50	30.41%	30.83%	29.90%	26.67%	28.99%
51 +	17.57%	19.58%	20.62%	20.00%	25.63%

Ethnicity*	Midwest 2018	Southeast 2018	West 2018	Northeast 2018	Winter 2019
	*Question not required (answers may not total 100%)				
Caucasian	91.22%	90.00%	78.35%	82.00%	81.51%
Other Ethnicity	6.76%	7.50%	20.62%	16.00%	13.03%

Years of Experience in Association/Chamber Field	Midwest 2018	Southeast 2018	West 2018	Northeast 2018	Winter 2019
	Less than 2 years	9.46%	10.83%	12.37%	2.67%
2 to 5 years	30.41%	39.58%	28.87%	27.33%	34.45%
6 to 10 years	25.00%	24.17%	19.59%	26.67%	24.37%
More than 10 years	35.14%	25.42%	39.18%	43.33%	32.35%

How Did You Learn About Institute?*	Midwest 2018	Southeast 2018	West 2018	Northeast 2018	Winter 2019
	*Multiple Responses Possible				
Employer	54.05%	69.17%	56.70%	54.67%	55.46%
Colleague	32.43%	22.08%	30.93%	29.33%	33.19%
State Conference	7.43%	5.42%	0.00%	0.00%	5.46%
Direct Mail	0.00%	0.00%	1.03%	0.00%	0.00%
Email	2.03%	1.67%	1.03%	0.00%	1.68%
Website	0.68%	1.67%	2.06%	2.67%	0.00%
Other	3.38%	0.00%	8.25%	0.00%	4.20%



DEMOGRAPHICS

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

DEMOGRAPHICS BY SITE

Organization's Budget Size <i>(excluding Public Funds)</i>	Midwest 2018	Southeast 2018	West 2018	Northeast 2018	Winter 2019
Less than \$100,000	3.38%	4.58%	1.03%	0.67%	3.36%
\$100,001 - \$250,000	8.78%	17.08%	7.22%	8.00%	14.29%
\$250,001 - \$500,000	18.24%	19.58%	13.40%	12.00%	19.33%
\$500,001 - \$1,000,000	23.65%	24.17%	21.65%	20.67%	14.71%
\$1,000,001 - \$3,000,000	19.59%	15.42%	31.96%	20.00%	18.91%
\$3,000,001 - \$5,000,000	4.05%	7.08%	8.25%	9.33%	7.98%
\$5,000,001 - \$10,000,000	10.14%	7.92%	4.12%	10.67%	10.50%
Greater than \$10,000,001	12.16%	4.17%	12.37%	18.67%	10.92%

Organization's Staff Size	Midwest 2018	Southeast 2018	West 2018	Northeast 2018	Winter 2019
Less than 3	12.16%	20.83%	10.31%	14.00%	13.87%
3 to 10	48.65%	48.75%	44.33%	35.33%	49.16%
11 to 25	16.89%	13.75%	25.77%	22.00%	15.13%
26 to 50	9.46%	11.67%	11.34%	6.00%	10.50%
51 to 100	6.08%	1.67%	4.12%	10.00%	3.78%
More than 100	6.76%	3.33%	4.12%	12.67%	7.56%

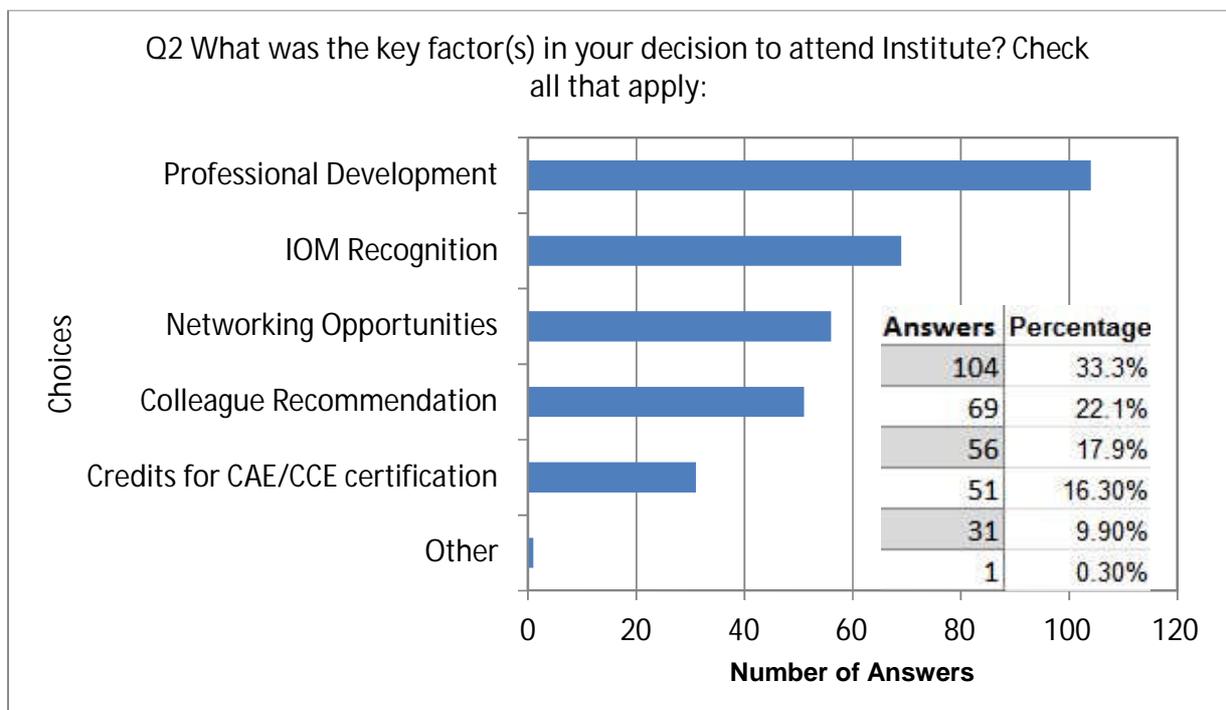
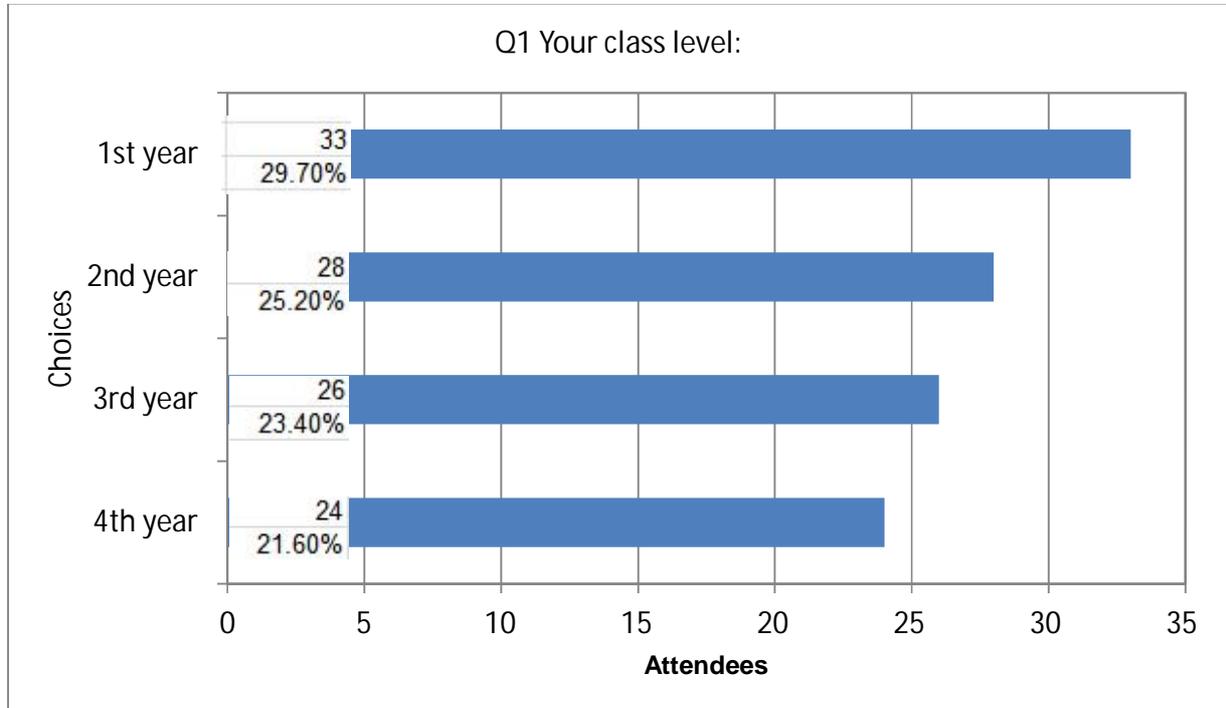
Level of Responsibility	Midwest 2018	Southeast 2018	West 2018	Northeast 2018	Winter 2019
CEO / Executive Director	31.08%	34.58%	23.71%	26.00%	34.87%
Senior Executive / Department Director	37.16%	37.92%	44.33%	41.33%	38.24%
Manager	20.27%	17.50%	12.37%	21.33%	15.55%
Coordinator / Assistant/ Other	11.49%	10.00%	19.59%	11.33%	11.34%

Primary Job Responsibility	Midwest 2018	Southeast 2018	West 2018	Northeast 2018	Winter 2019
Membership	19.58%	18.56%	13.33%	16.13%	15.13%
General Management	41.67%	38.14%	38.00%	46.77%	42.44%
Marketing	9.58%	13.40%	18.67%	10.08%	11.34%
Finance	3.75%	5.15%	4.00%	3.63%	2.94%
Government Relations	5.42%	5.15%	8.00%	6.05%	8.40%
Other	20.00%	19.59%	18.00%	17.34%	19.75%



WINTER

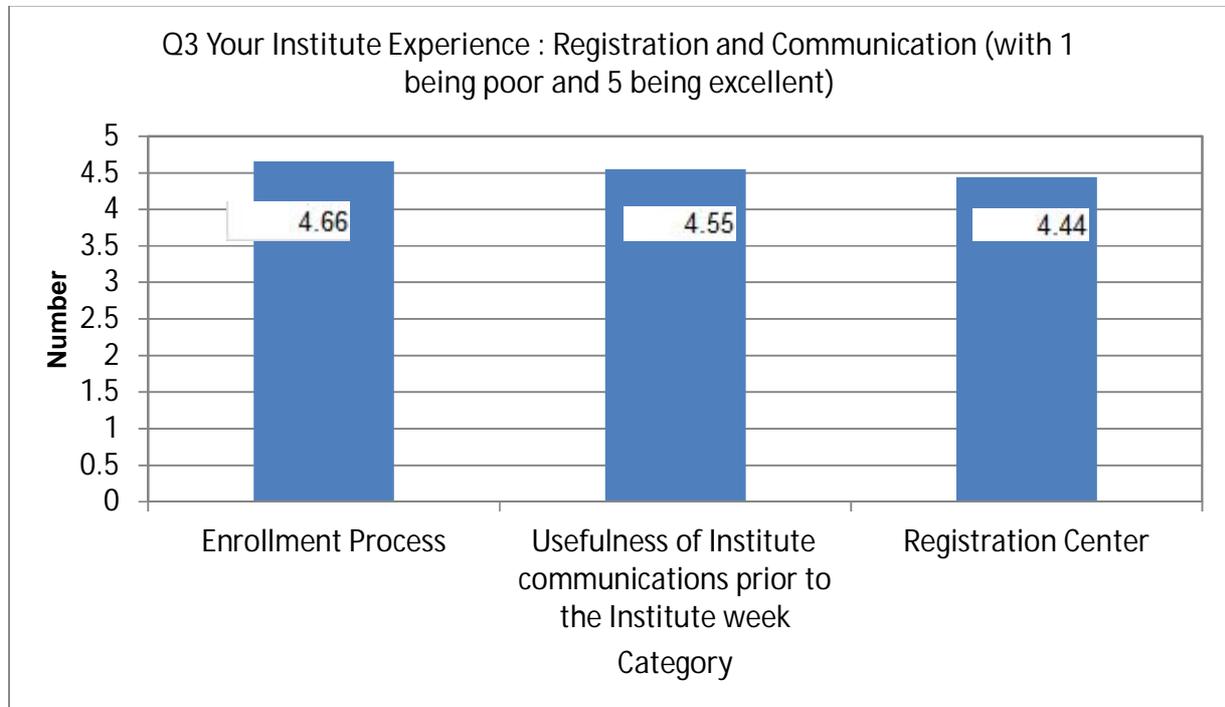
ATTENDEE SURVEY RESULTS AND FEEDBACK





WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK



Q4: Additional comments about registration and communication*:

- Registration went very well. The communication was great, but there were a few times that were changed or incorrect. Some of the emails I received said registration was at 2:00 instead of 2:30, other than that, no issues.
- Registration was an absolute breeze, although I didn't receive my shirt for the 5k but Rick was gracious enough to give me his. I think there were a few emails that didn't reach the entire class that might have been miscommunication between the class advisors, other than that everything was so well organized and well ran.
- Communications got to be a bit much and redundant leading up to event. LONG emails packet with info, then much of that info repeated in other emails. Definitely could/should streamline those communications.
- I felt like there were too many emails prior to the actual event and several said the same thing just from a different person. I felt like I might have missed some important things because I didn't have time to look through all of the emails.
- Registration and communication prior from class advisors prior to Institute week was very helpful.
- Communication was frequent and informative. As always the folks at registration were happy, excited and helpful. The process was quick but initially seemed a little confused. I arrived 30 minutes early and was told they couldn't start for another 30 minutes. Then I saw people registering at the desk less than 15 minutes later.



WINTER

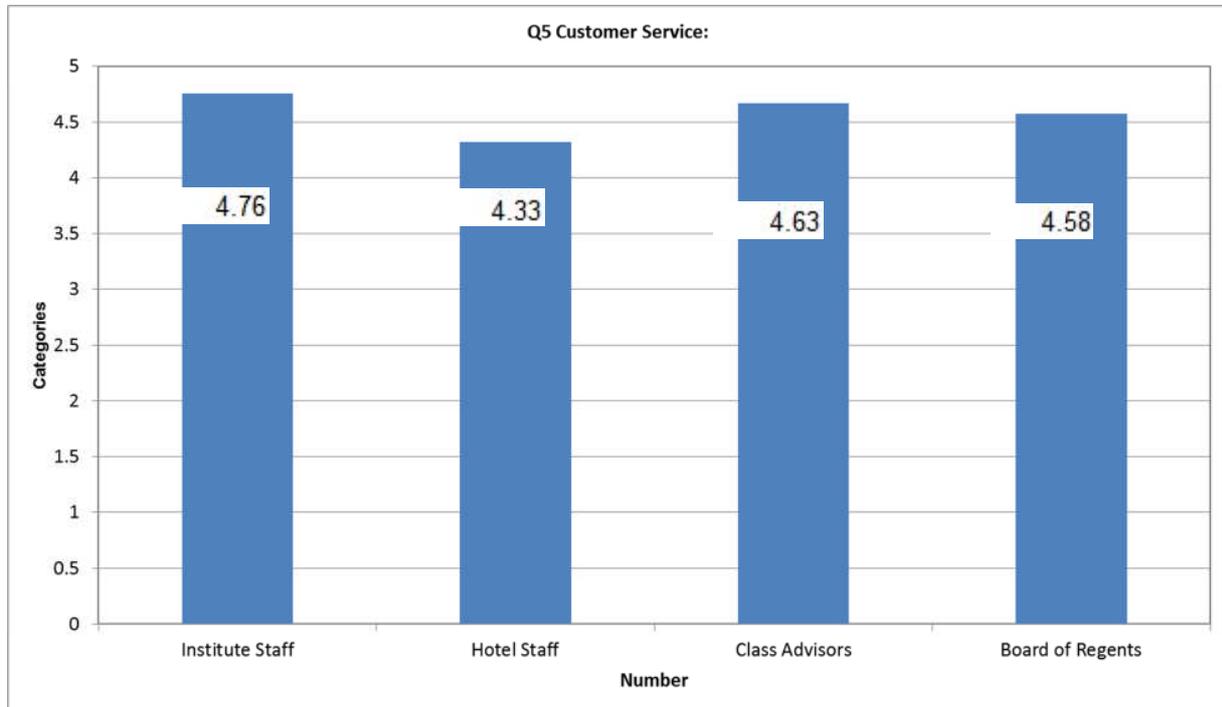
ATTENDEE SURVEY RESULTS AND FEEDBACK

- I appreciate getting information but we got what seemed to be a lot of emails prior to event.
- The lack of an attendee service center this year was difficult to get used to.
- Is there a way to list what electives have already been taken? I feel like I've taken a few classes twice.
- There was a LOT of not necessary communication from the class advisor prior. Maybe just a reminder for folks not to "Reply All" would have been helpful. There were a few days where my in-box was flooded with what people were packing.
- The introductions for the class handled by email was a bit difficult, lots of emails to shift through and not really any meaningful context.
- Had to call the office to register as website was not working.
- Very smooth, thank you.
- Received way to many emails before hand from advisors to keep track of everything.
- Communications following enrollment leading up to the conference were helpful reminders/checkpoints--we are all professionals, but I found that they kept me accountable and help me make sure all my ducks were in a row prior to the conference.
- More than enough communication which was great!
- In the communications, it would be nice if a direct link went to not only the IOM site but the actual registration site. This would be useful if you wanted to change or look at your schedule.
- I think it would be beneficial to have access to your class records in the website. This way we can insure that we are not repeating any classes.
- The electives we took previously should be highlighted so we don't retake one again unless we truly want to. The course handouts should be easier to download and available prior to class, not everyone wants to take digital notes especially not on a pdf.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK



Q6: Additional comments about customer service*:

- I had some problems with the hotel but those have been managed directly with them.
- I stayed at the aLoft and 3 out of the four days we had cold water. I'm still trying to get a hold of the management. Cathy Moore is the General manager and she will not take or return a call. At \$200 a night one would expect a GM to at very least call a customer back.
- Kudos to the Board of Regents for their intention to go out of the way to connect with the 1st year class. It was greatly appreciated. Our class advisors did a great job despite the change in set up as well.
- Everything was great! Our class advisors were top notch, and hope they are invited back next year. I will say, *removed* was the absolute best and very hospitable and caring for each of the students. *Removed* was a pleasure and always having a good time making people feel welcome and comfortable. I honestly can't say enough about these 2 ladies!
- The Board of Regents (and some advisors) seemed to be more interested in spending time with each other than getting to know students. On more than one occasion we overheard board members saying negative things about our class.
- The dynamic of the Board of Regents felt off this year. I understand people have bad days, etc but they didn't seem very approachable compared to my first year. They were still friendly and able to answer questions appropriately.
- I loved having *removed* as out class advisor. She was amazing, very helpful with any questions and so easy to talk to.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

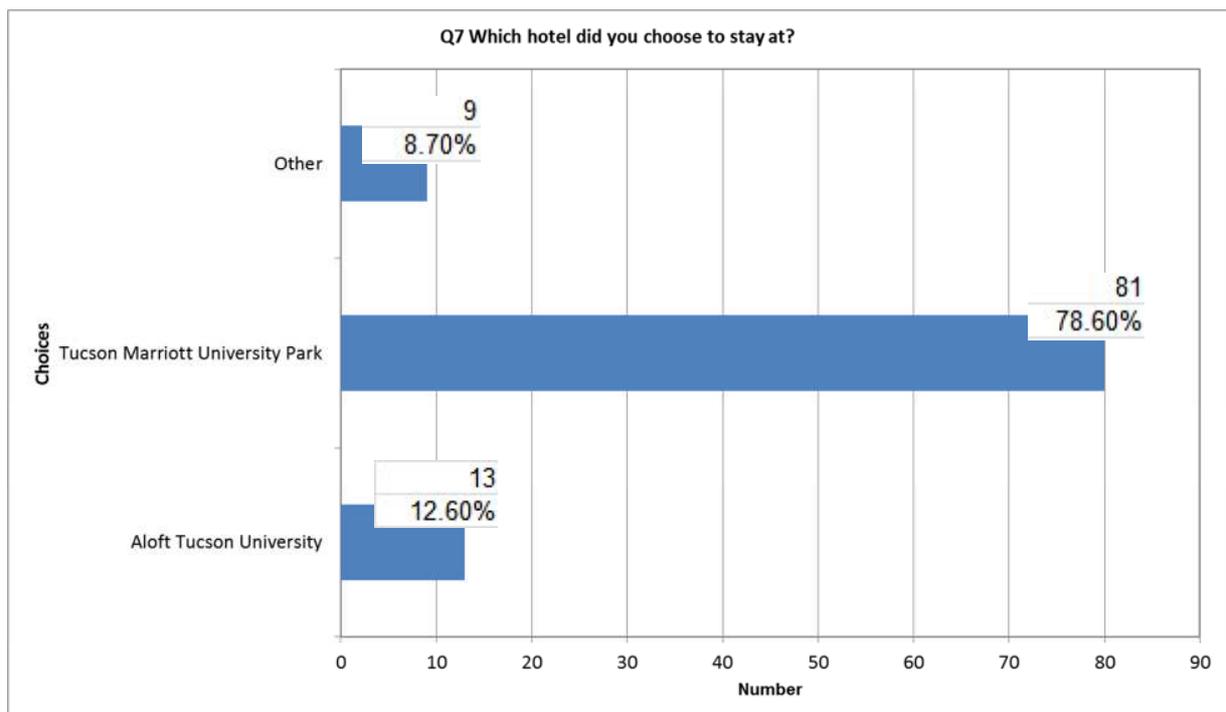
- The professionalism of our class advisor and classroom regent was severely lacking. From the inappropriate jokes about men during the homeroom session to the ridiculous amounts of talking about partying and drinking throughout, I was frustrated. I thought this was a professional program, yet each year it seems to become more and more unprofessional.
- 1. There was an institute staff person in my cohort. She spent most of her time on her cellphone and on her laptop. At one point the instructor was trying to get her attention, called her name twice and finally had to have another participant tap her shoulder to get her attention. Additionally, she would not participate in things like the class pic or sit with our cohort at the meal. It gave the vibe of us vs them. 2. I wish the hotel had been better equipped to handle the influx of guests on Sunday. They seemed understaffed. 3. *Removed* was awesome! 4. I don't understand why the regents feel they need to interrupt classes to make announcements. It's disruptive.
- I stayed at the Aloft so I don't have comments on the Marriott hotel staff. The water at the Aloft was never warmer than a cooler lukewarm so if there is another offsite hotel to use, it might be worth it. I did not interact with the board at all.
- Waited 2 hours for my room.
- The one comment I have about hotel staff. On Sunday due to travel issues I requested a private conference room to evaluate my luggage and they said "just pull it out on the bench over there" Furthermore, I asked to be put on the waiting list to get in a room as quickly as possible to evaluate luggage. The time I arrived was 10:45 am at 3:00 when I still did not have a room I asked again and was told I was 9th on the waiting list. I had many classmates that arrive after I was put on the waiting list that received a room before 3:00 pm. I think given they were aware we were all arriving between 10:00 am and 3:30pm they would have a better plan for room selection.
- Hotel staff was excellent, friendly and helpful. My only less-than-excellent experience happened after arriving early (at 2pm). My room was not ready, which was completely understandable at that time. I checked back at 2:30pm, also acceptable for not being ready. When I checked back at 3pm, which is normal check in time, and my room was still not ready, that's when I was irritated. This was not staff's fault of course, and they went above and beyond to make it up to me by upgrading my room at no additional charge and getting me in a room. So I am exceptionally pleased with the hotel staff who was so helpful, kind, and called me by name every time they saw me. However, I'm confused why the hotel was so unprepared.
- My only fault with the Board of Regents is when we took our state picture, *removed* did not wait for all the classes to get out and we were missing two of our classmates from our state. I repeated told her that we were missing people, but she didn't seem to care.
- I felt like there was more engagement between the Board of Regents and the staff with our class this year. Perhaps it was because we were graduating and had more occasions/reasons to have conversations about logistics, but I really felt like this group reached out to us a lot to make us feel welcome!
- I thought the Chamber Foundation staff did an excellent job given the circumstance of not having the University to work with. The rooms were tight but they tried to make them as comfortable as possible.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

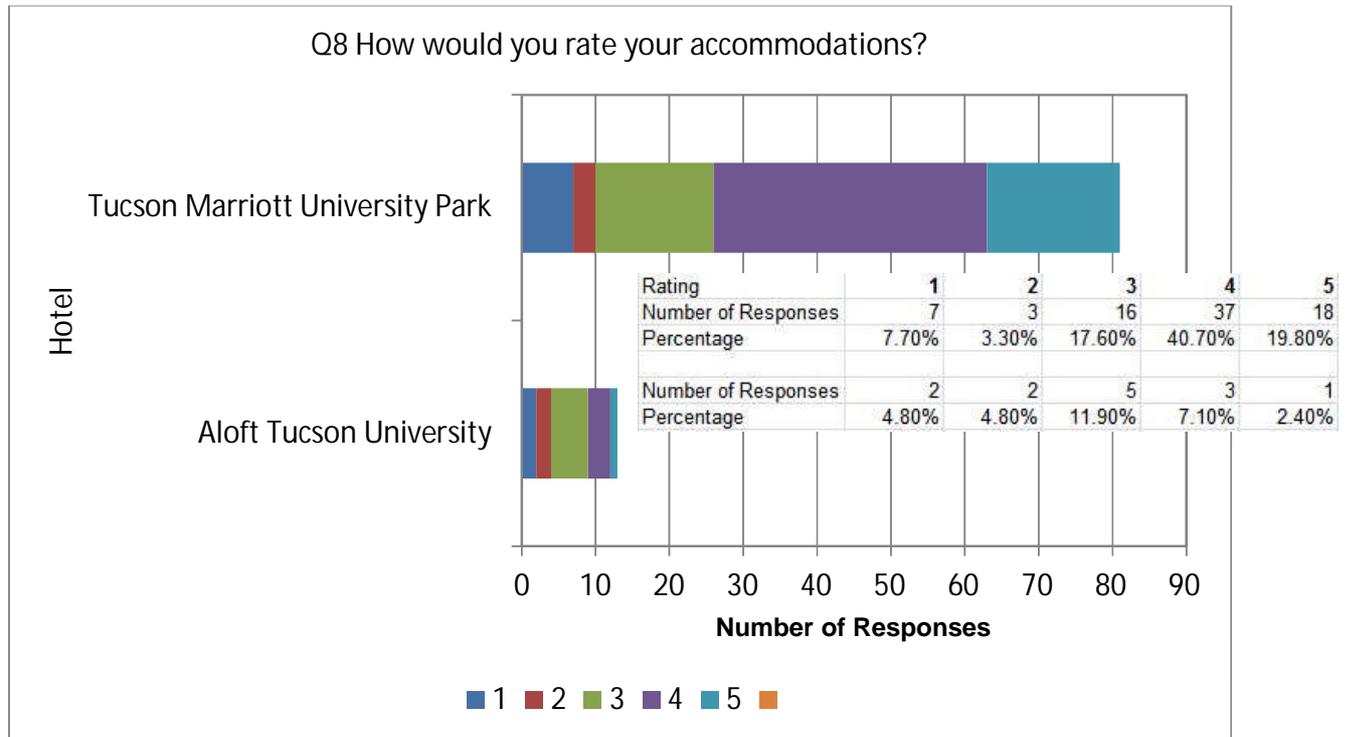
- I felt there was a little too much communication of introducing ourselves via email before classes started. With such a large class, it was a bit much in the inbox. My only small issue with our advisors is they talked to each other quite often during presentations/classes. It was a little distracting for me, I wished they would discuss outside of the classroom. I'm just a very picky person about talking during presentations, even some of my classmates did it and I wasn't happy with them for doing it either.
- This was a great year for a customer service experience at Institute! The Marriott staff was great, Class adviser was wonderful and the BOR are always a joy to talk with.
- I didn't really interact with the institute staff.
- Everyone went out of their way to make me feel comfortable and welcomed with the understanding it was long days and nights.
- Great customer service by the people. Kind and friendly.
- My class adviser *removed* was the best.





WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK



Q9: Additional comments about accommodations*:

- I was disappointed that we had to pay for parking, that added up over the course of the week. Also, internet was free throughout the week, but on Thursday at noon, you had to pay for internet.
- Any help in getting at least some of our room fees back from the Aloft would be grateful. In talking with the Marriot franchise in our area the standard Marriot practice is 50% reduction of fees for issues like no hot water.
- The rooms were great, the staff was very helpful and accommodating.
- Marriott was convenient, but it was SO loud in the rooms because of noise in the atrium and from the street once students were back. I did not get one good night's sleep all week.
- I stayed at the Aloft last year and honestly liked it a little better. If I knew by staying at the Aloft I would have received uber credits to travel back and forth to class I would have stayed there again. It was nice to be at the Marriott where the classes were but it was loud with the atrium.
- Check in was a real problem, couldn't get in my room until after orientation. The bed was very uncomfortable and slid off the box springs.
- As I said above, the Aloft did not have hot water at all during my stay. No mention was made of a reduction in room rate, etc.
- Marriott was already booked when I registered in November, had to Airbnb it for the week. My accommodations were fine but I did hear LOTS of complaining about the Marriott and Aloft. I think I dodged a bullet there.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- This is not a comment about the hotel, but rather a comment about Institute and their transportation. I heard from others that folks who stayed at the Aloft were not provided a bus shuttle service but rather given \$25 Uber gift cards. Many of the students did not receive these cards, I heard. Also \$25 doesn't seem enough to cover the constant transportation needed to travel at least twice a day between hotels. It's confusing why Institute did not offer shuttle service between hotels this year.
- So loud - but understandable with so many people.
- AC Marriot and JW Marriot were superb! Too many past issues from Tucson Marriot University!
- Hot water was clearly an issue at the start, however it seemed to be repaired after the first day.
- With registration starting at 2:30, events at 4:00 and the flight schedule that many of us have to use to get to Tucson by 4:00 - it would be helpful if the hotel could be prepared for us by making rooms available for check-in as early as possible.
- I moved hotels with another classmate mid-week. While the convenience of the Marriott is wonderful, the lobby noise that drifts up the floors is horrible. I know there isn't much you can do about this problem due to the design of the hotel.
- Definitely not up to the standards of other Marriotts that I have stayed in.
- Although it was not a problem for me, I found it very odd that hotel check in began at 3 and the rooms were not ready for check in at that time. In fact, my room was not ready until after the opening welcome session. They were kind to hold my luggage in a locked office, but it was as if they were not prepared for the mass of people who were told they could check in at 3.
- No hot water for the the first 3 days otherwise the staff did their best to help and explain.
- Accommodations were OK. Having the only stairs accessible through going outside was inconvenient, but not horrible.
- Obviously, the hotel was dated. The room sizes were difficult for our class size but we were able to rearrange it and make it work, in the end.
- Room was not ready at check-in. Bathroom smelled like body odor. Shower drain plugged, two visits by maintenance and only partially resolved. Loading dock delivery/garbage pick-up at 4:58am Monday morning; they said it was a neighboring business that "was not as considerate as they are."
- It very nice staying in the same building the classes were held in.
- Experienced no hot water 2 different days. Front desk staff was less than friendly about the situation.
- The hotel itself wasn't that bad, but we went without hot water for 2 days. They awarded us points to make up for it, but that still costs our Chambers money. Also, we heard they had been having the issue for weeks leading up to our stay and no one was notified. At least not that I am aware? Also, Ubering everyday back and forth became a real pain, even though it wasn't a terrible distance.



WINTER

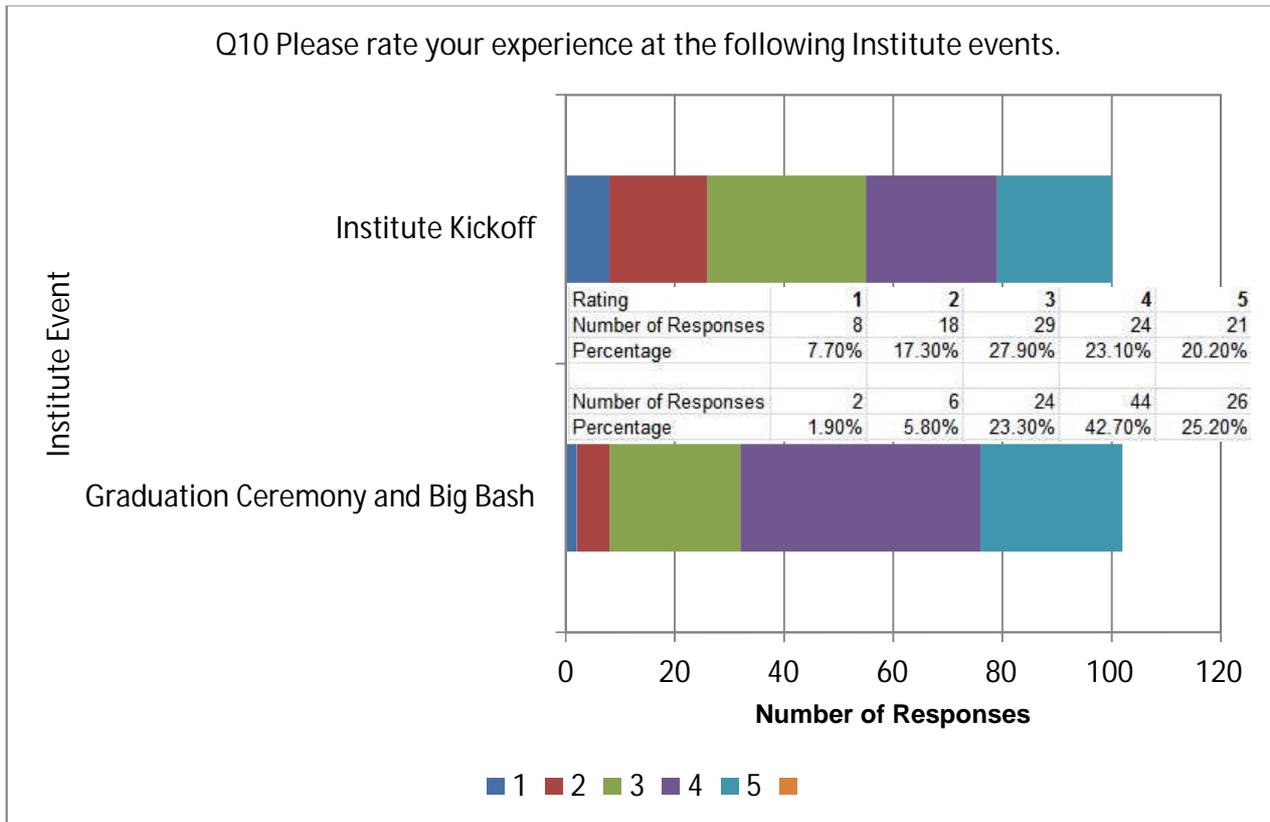
ATTENDEE SURVEY RESULTS AND FEEDBACK

- We had no hot water in our shower for the first three days. They said we were allowed to move hotels with no fees but the University Park was full. They did take a night stay off of my bill but we each had to handle our own cases individually. When I talked to Aloft at departure, they had no resolution for the entire room block from Institute and I felt the room block coordinator could have used their leverage to help. I've managed group reservations before and if this was my group, I would have advocated for a 'bulk' resolution. Aside from the cold water showers, the Aloft is a great property. Thank you for the UBER credits!
- It was great having all of the classes and events at the hotel. I highly encourage doing that in future years.
- Please don't move it on campus next year. Be able to run up to your room during breaks was awesome!
- I realize the options in Tucson are limited but it's a terrible Marriott and a shame to their brand.
- The Marriott is so desperately in need of that long-anticipated renovation. I'm thankful I won't have to stay there again!
- The hotel public spaces and my room was a little rundown but i understand they are renovating this year and it will be completed by the time we return in 2020.
- I though the accommodations were nice. There were a few key things that in the beginning needed improvement. For example, the breakfast, it seems by the end they did get that down pat. The other issue was our room was the SMALLEST and most cramped room. We actually tried to re-arrange it ourselves and made it a little better. Just a little claustrophobic. Snacks at break were nice.
- Had requested an early check in but they were unable to accommodate, lost my CC authorization form (I had even called and confirmed with their accounting that they had received it). But Staff itself was very nice and easy to work with, their texting with staff made everything even easier.
- The rooms were definitely not upgraded! The lobby wasn't anything to rave about either. Having graduation onsite was a disappointment especially with how poor the hotel was.
- The room our group home roomed is was too small for the size of group. The room smelled when we got their and the problem was identified as the linens, took forever to get them changed.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK



Q11: Additional comments about events*:

- I miss the opening night party. I imagine it was hard for the first years to really engage the way I did my first year. It's a great chance to get back into the swing of things TOGETHER.
- The Kickoff was not explained to our class, our adviser's wanted us to create a class yell and didn't explain what was going on at all. We arrived at the Kickoff fairly confused at what was going on.
- The kickoff was too warm and cramped.
- We were disappointed that there was no opportunity to mingle with other classes at kickoff as there had been in previous years. I understand some offsite activities were scheduled, but having a kick-off event (with food and drink tickets provided), gave students a chance to mingle with other classes and students at the start of the week. The only other "official" opportunity to do so was graduation, but that seems a little late to establish new friendships. The Frog event was fun, but not many people participated!
- The venue experience did not compare with previous year's standards, with cocktails and networking opportunities.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- The idea of the kickoff is wonderful however the execution was subpar. To travel a whole day for an hour of 'class' rubs me wrong. I would rather have 4 full days of class/kickoff then travel for 1 hour of requirement personally. The kickoff space was crowded. I liked having the advisers introduced but didn't feel the sense of WELCOME like last year. I was okay not having a meal but a networking opportunity in the same space with let's say all the second years would have been nice. It seems once you are separated by 2-1 and 2-2 those are the only folks you get the chance to meet. Again, these are all my personal thoughts and preferences.
- Both great events!! Made me feel like I was High School again! Loved the supportive nature of everyone, especially just meeting some of these people for the first time. Wonderful atmosphere!
- The meal was a disappointment.
- Graduation seemed a little rushed with calling off the names of the graduates then another one right after it. I suggest dinner first then you'd have more time for graduation.
- Kick off - there just doesn't seem to be much value in the kick off event. Graduation - speeches (one in particular) got MUCH TOO LONG this year. If 4 people are going to speak, they need to be kept on a tight restriction timewise. Consider serving the meal first and allow the speaking during or after.
- Kickoff needed some type of mixer for us to get to know other IOM attendees. Big Bash was okay. Everyone was talking over the speeches and graduation, which was a bummer.
- 1. Kickoff - Why was this a rehash of most every announcement made in homeroom? I found that to be a waste of time. Don't have programming just to have programming. Also the drunken 4th years were obnoxious and unprofessional. 2. Graduation - it was okay. I'd recommend limiting the speech time. 4 people speaking for what seemed like a total of half an hour was a bit much, especially since their speeches contained inside jokes that I'd dare say most of us didn't get. It felt exclusive.
- Due to the venue changes and utilizing the Marriott for everything caused some disruption and the Kick-off and Big Bash seemed so much more scaled down and seemed like we didn't get our money's worth - at least in comparison to previous years.
- I enjoyed the Kickoff event much better last year. The bingo game gave us all the opportunity to network and meet new people. Also, our classmates used their giftcards won to celebrate and we all enjoyed. Furthermore, it was nice to have the appetizers and drinks as part of the cost. The bash was great this year except the chicken was dry. Of course not your fault, but just my input.
- The kickoff was mediocre. It was quick and uninteresting. At least it was nearby. It was disappointing that Institute chose to cut the meal. Institute seemed to have cut many meals and many other costs this year. The graduation party was excellent and I loved having it at the Marriott! I would love to have it there every year! What a great experience! More caution needs to be taken next year with special diet needs students. It seemed everyone was served the same dinner. I had a lady at my table who experienced this.
- Institute kickoff was pretty pointless, in my opinion. I expected more than just taking attendance and hearing the same rules/comments about the week that we heard in the main session with the board of regents. The big bash was great. No complaints other than seating was a bit hectic.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Kickoff lacked the excitement and "kickoff" that past kickoffs have provided. There were no food, drink, networking, etc. As a graduate I was able to experience that past 3 graduations at JW Marriot and sadly, the year I graduate, the graduation was downgraded to the Tucson Marriot University. Food was fine but the atmosphere was drastically lacking and left most 4th year attendees disappointed.
- I expected both events to be longer and more in depth. Institute kickoff was great, but it was primarily an introduction of people. It would have been fun to get the classes more involved/hyped. The Big Bash was great but it could have been nice to have the talks/speeches throughout dinner. I expected the ceremony to continue after we were done eating but it turned into a dance party!
- No networking opportunity at the kick-off. Felt rushed and cramped.
- Classes need assigned tables. I was separated from my class because of no seating availability. Seating was a mess.
- These events lost a bit of their luster this year. They did not encourage class networking and recognition. The lack of class pictures at the end was quite an eye-opener, as this did not provide the upcoming classes a chance to have a professional photo at the graduation ceremony.
- As a Class 4 participant, I was disappointed in a few things. #1 - I thought with the move from the JW to the University location, we would be provided with more of a "wow" factor to our graduation to compensate for the change. However, the food was MUCH better! #2 - Disappointed that the Board of Regents could not meet my class as they exited the stage, instead, we needed to be congratulated from the back of the room while the other class was congratulated as they walked off the stage.
- The location of the ceremony was not as beautiful as the location last year, however, it was a very fun event and I felt like it was very celebratory! The Kickoff event was great, but as compared to the other years when there were dinners associated with the kickoff, it was as if we could have rearranged our schedules and added the graduation practice after one of the shorter class days to make for one less travel day.
- Was there a Kickoff? Not like in the past. The Big Bash was definitely not worth the \$75 it cost for my husband to attend. The food was not very good. Seems to be a theme with the Big Bash over the years.
- The Kick-off seemed anti-climatic. I also felt like the one class bringing confetti and items that created a mess, was not very professional. The Big Bash was OK. It seemed to start late and end early as compared to other events in prior years. Our table was also very crowded with 13 people seated. Made it hard to move and eat. Maybe people crashed our table that weren't assigned? It was a little crazy.
- I was disappointed in this year's Big Bash. In the past, tables were reserved by class; this year, it seemed a free for all to find seating. Also, I liked the setting better at the JW Marriott.
- Really missed the Star Pass Resort.
- The meal provided at the graduation ceremony was not good. Should have had more than one bar for the reception.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

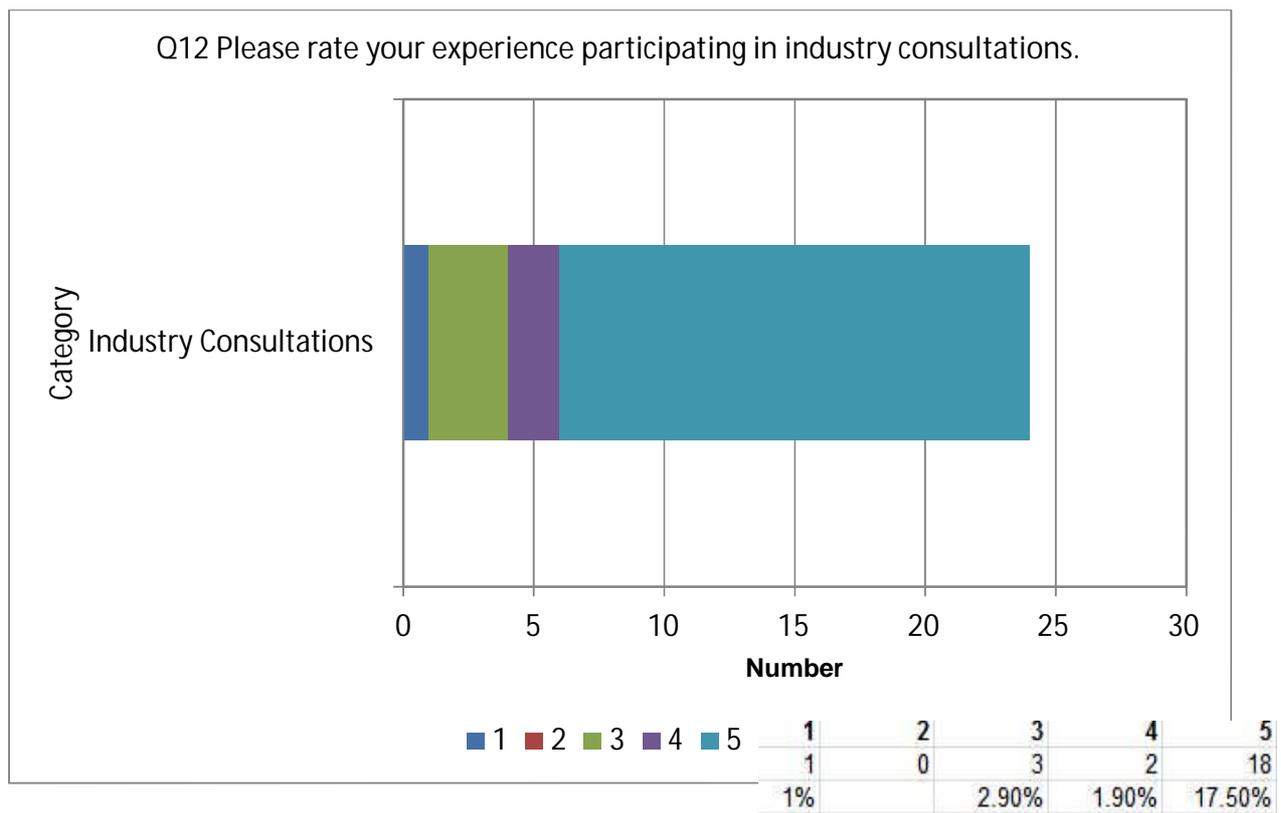
- I would not even have the kickoff if it's going to be the same next year. Sorta a let-down.
- Wish the kick-off had some sort of reception that was a part of Institute. Graduation was not as good being at the Marriott. Would have been nice to go off-site to make it something really special for the graduates.
- Kickoff was disappointing this year. It was more like a "pep rally" than a "kick off."
- Kickoff- It would be cool to do a state roll call and recognize by standing up who is in what state. I loved the state photo idea this year, because I didn't know we had so many from our state attend. The Chamber Chicken would not have been my selection for the dinner. I also enjoyed having the dinner last year, off site, better- it felt more special for the graduates.
- I was thankful the food was better than Star Pass was past 3 years, however the venue at Star Pass is much more desirable.
- The graduation/big bash did not feel special like it was in past years since it was in the same location as all of our classes. However, the food was significantly better than any of the previous years.
- Better communication of what to expect would be good. Had no idea there was a DJ and things like that.
- Kickoff was nice but the hall we were in looked like a 1950's AMVET hall. Not the standard I'm used to from Institute. Graduation and Big Bash was not as nice as year's past at the J.W. Marriott. Food was Chamber Chicken and not the nice steaks I recall from years past.
- Long speeches and short amount of time to network/socialize before and during the event (Grad Ceremony and Big Bash). Music/socializing was cut short I felt. One of the only events where everyone is together without having to leave the property. Otherwise, great events!
- I have heard that the Big Bash at Villanova is the best. I have nothing to base this off of as a 1st year but it seemed like just as the party was really kicking into gear, it was over and the lights were coming up. The DJ also had their own agenda and didn't play any of the requests made.
- Was a little disappointed with the kickoff. During my first year (2018) the kickoff party/dinner was a critical time where my class got to know one another and had the opportunity to network with all those at institute. Again, comparing year over year, the JW Marriott experience was ritzy and showcased a different side of Tucson. The big bash this year was convenient being in the same location, the food was good, and the DJ was fun. Would have liked to have a professional state and class picture made, seeing as there was a photographer for part of the time--I understand trying to be cost-effective and I still had a great time, I just had a different expectation from my first experience.
- Band was not that great, not peppy, modern.
- Both events were very disappointing this year in comparison to last year.
- Would like to have eaten before Graduation ceremony.
- Kick off lacked luster. Year one it was like a big celebration! This year, it felt like we were in a gym and got a quick presentation and then left. The room was a little weird and backward. Always enjoy the bash! Would have liked the DJ to play until at least 11pm vs 10pm.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- It felt like several things we cut out of the programming this year - the kickoff event being one. If I was a first year attendee, I would have felt very lost as the kickoff was always a nice way to interact more with those in my class but also those who had attended this site before. It was nice having everything in one place this year - although I know myself and several others missed not going up to the star pass. I also think you should bring back assigned seating for each class at the big bash. We had several classmates who weren't able to sit with us or even near us due to lack of seating.
- The kickoff was horrible. Tiny room no snacks, drinks, or anything. What is our registration paying for? It went up this year and we got less.
- Kickoff was a waste of time, graduation was okay, but food was not the best. At least this year the chicken was cooked.
- Kick-Off should have a reception. Graduation Ceremony was fun, maybe option to have the event last longer?



Q13: Additional comments about industry consultations*:

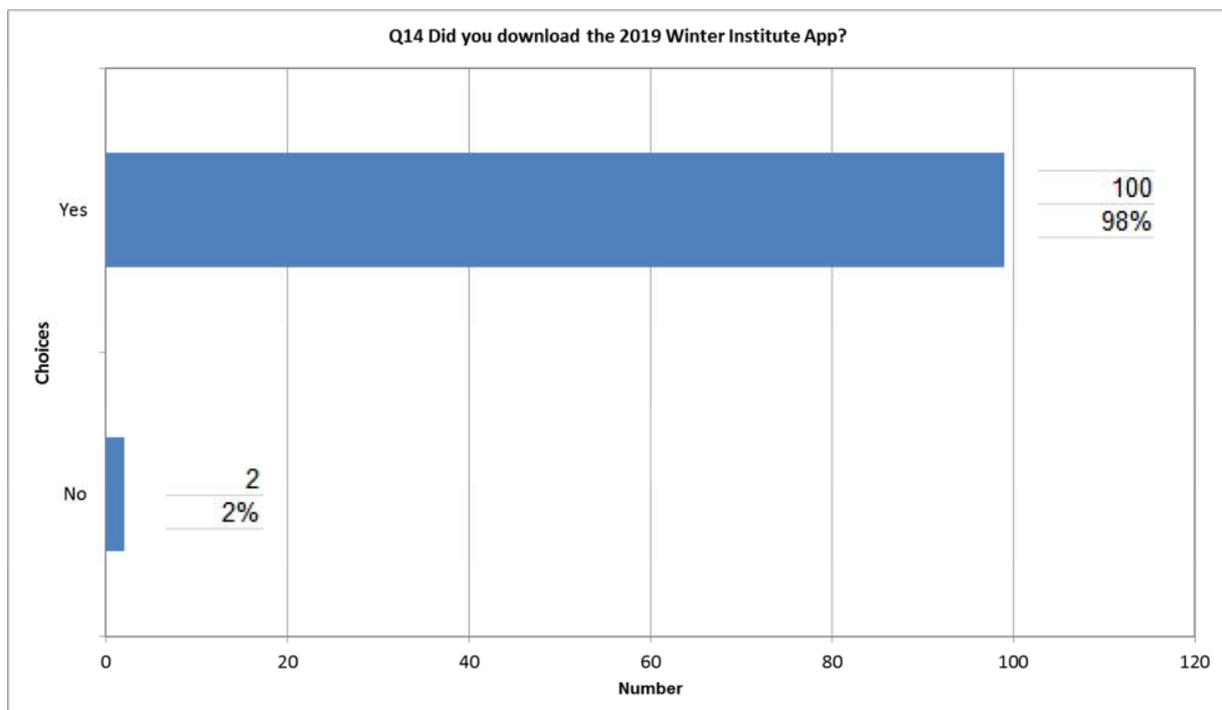
- I didn't participate, I didn't want to miss any of the classes and honestly, wasn't sure how to go about the consultation until the last day.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

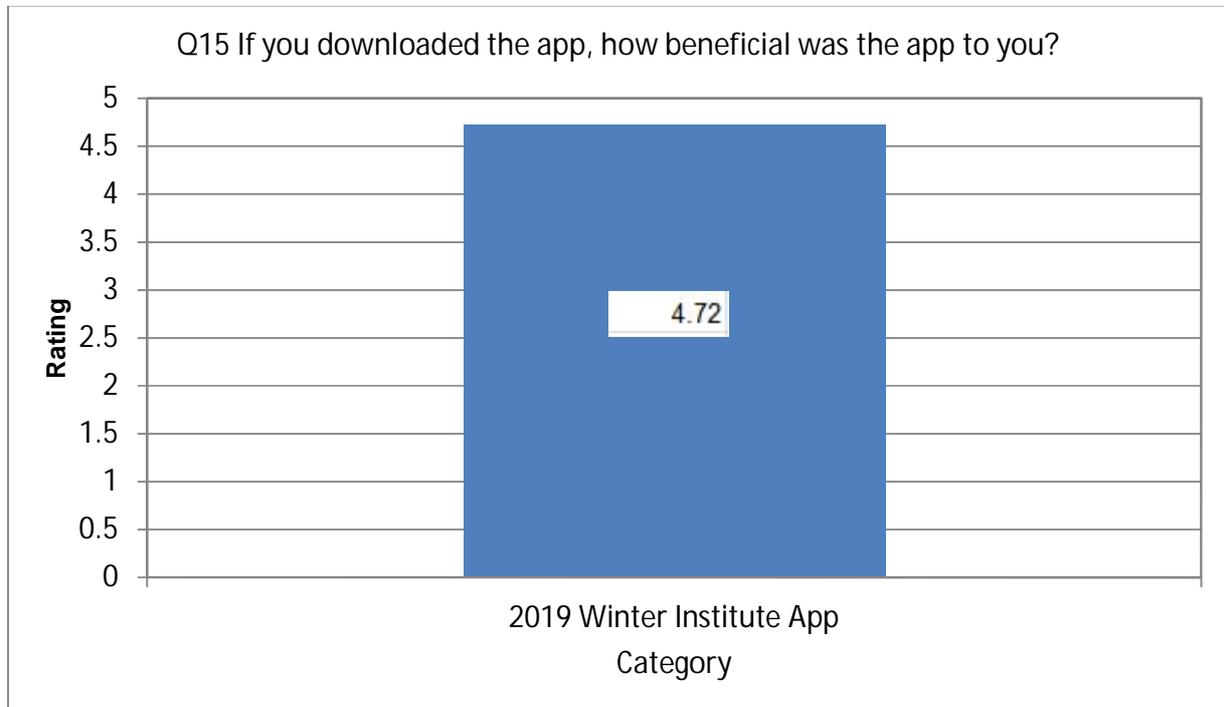
- This was the first time I had ever heard these were available and several other students in my class said the same thing. This was disappointing for all of us to find out, as we missed 2 previous years of this great opportunity!
- Great! Didn't even know about these until this year. I received very good info from my consultation that I think would be especially helpful.
- I didn't participate, but really like the opportunity for people to do this!
- There was not very much time to find in the schedule for this.
- I did not seek any industry consultations.
- Was pretty disappointing in this. I submitted a request to talk to someone on day two, every day I was told someone would get in touch with me. No one ever did. Then I was told they would contact me after the event. It's now Thursday and still haven't heard from anyone. At this point, it doesn't really matter but not sure if I'll even make a request next year....
- Probably should have taken advantage of opportunity. Didn't have issue in mind until I got on the plane back home! Next time.
- *Removed* was AWESOME to talk with. He helped me with three issues I was having challenges with and I will for sure keep in touch with him for further advice and assistance.
- Really liked the adviser paired with me for my specific need.





WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK



Q16: Additional comments about the app*:

- Great resource and very helpful! Loved not having piles of paper to deal with.
- The app was wonderful - best one in my four years of IOM.
- OMG, the absolute best thing since slice bread!!! I loved it!!! I want one for our Chamber!
- The app was great! It had everything I needed on there from my schedule to the main schedule and events.
- It only got a 4 instead of a 5 because of desktop access pre-Institute. The phone app was great!
- LOVED the new app! Loved, Loved, Loved it!
- The app was amazing and my lifeline throughout the week.
- I liked and utilized the app a lot!
- LOVED the new app! It was so easy to use and navigate. Only suggestion is roll it out earlier next year so that we can prepare in advance.
- I don't like downloading Apps on my phone. I recognize the usefulness and how others found it wonderful. It was useful, compact and definitely a one-stop resource to find out everything we needed to know. I don't like Apps. It would have been nice if it were an option instead of a requirement.
- I liked the app much better this year than previous years.
- That app was great! It allowed me to be completely paperless while at Institute!



WINTER

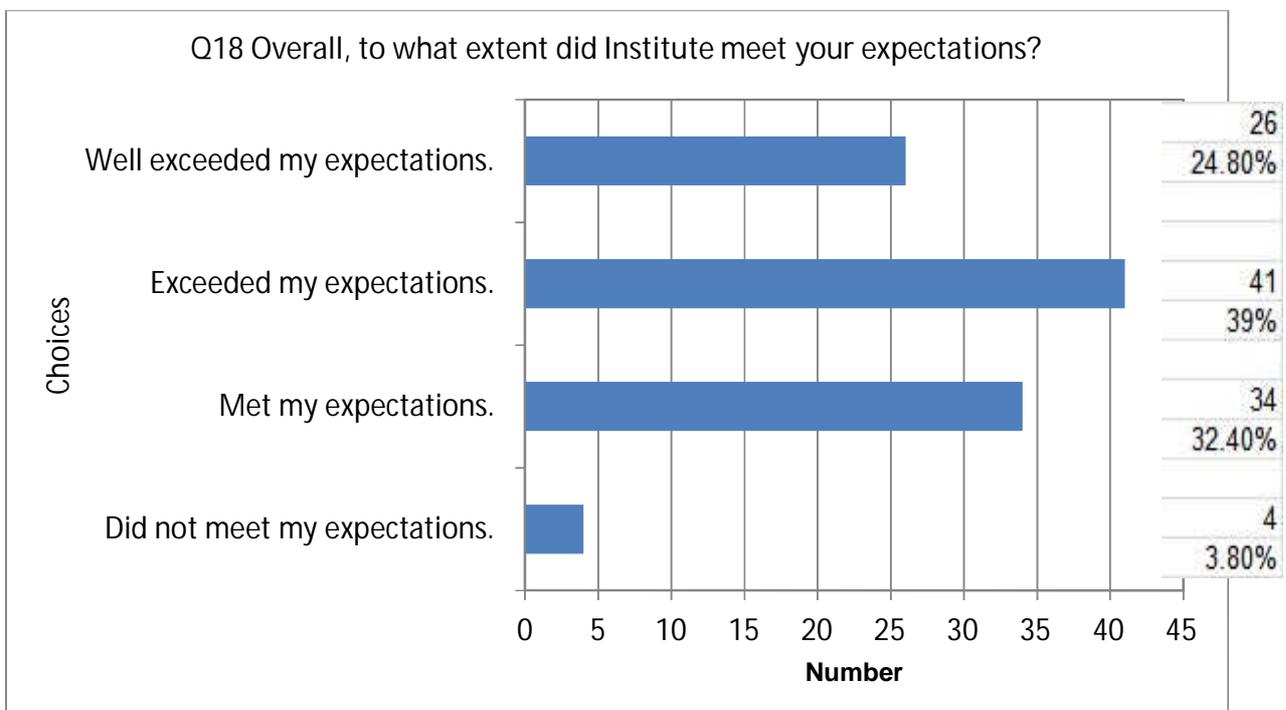
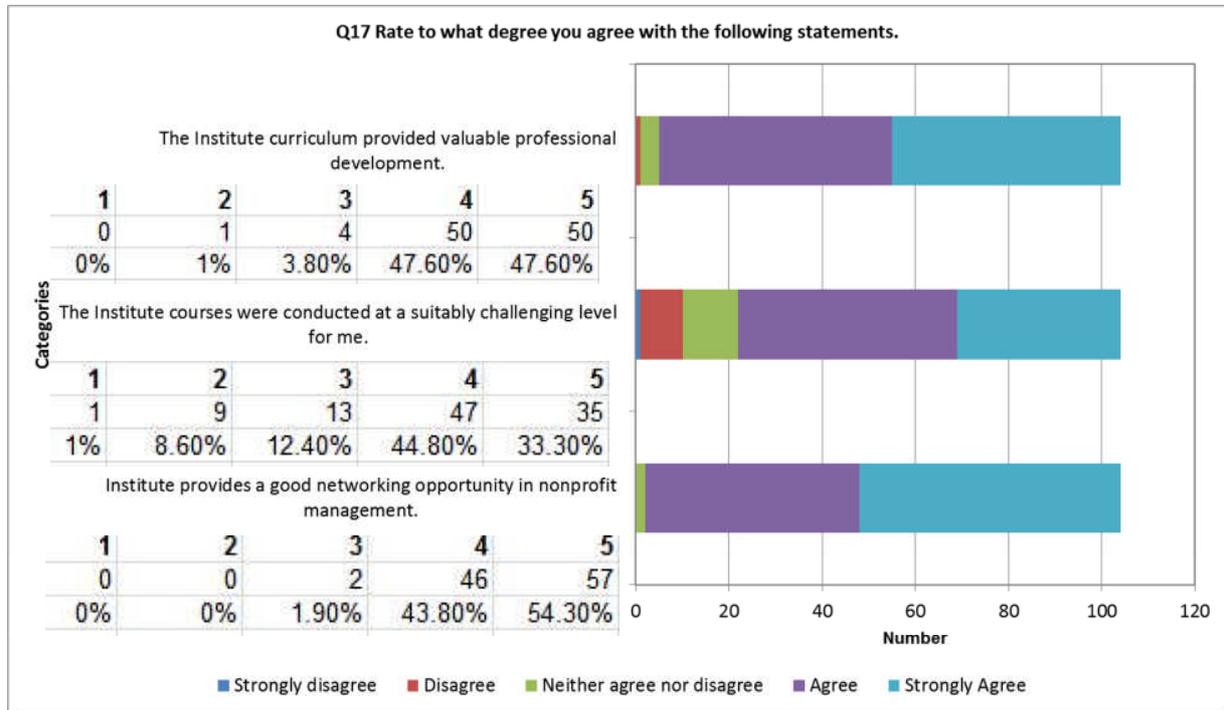
ATTENDEE SURVEY RESULTS AND FEEDBACK

- Loved it! Great decision in upgrading to this new platform.
- I couldn't get the app to download on my android.
- Better than the app from previous years.
- I felt like this app was more user friendly than the apps from other years!
- Loved! Very well done.
- App was fantastic. It had more features than expected, and everything worked flawlessly. It was a huge help throughout the week.
- Loved it! Keep using it next year!
- It served its purpose well.
- I thought the app was very user friendly and useful.
- LOVED the app!
- App was helpful - All presentations uploaded ahead of time please!
- There was still some paper forms, which could have been useful to have in the app (I know apps cost a lot). More encouragement of interactions between attendees/speakers/staff, etc. would have made for a more engaging experience and reason to utilize the app.
- It would have been helpful to have a meeting room map included in the App.
- Loved having everything in one place! Much better than the prior app.
- I liked that my schedule was there and each class had handouts on it.
- The note taking function on the app was cumbersome to use.
- The app was great, it was easy to use.
- Used it daily.
- LOVE the new app this year. Very helpful and user friendly. Thank you for making that happen!
- I REALLY liked the app much better this year than last year!
- So helpful--very well done!
- Instructors should all upload their presentations to the app prior to institute and in a program that notes can be easily added. *Removed* was an annoying class advisor. Always yelling and inserting too much of her experiences into the class. It's our session to learn and share.
- App was amazing!! Only suggestion would be segmenting the attendees between the years vs. having them all together.
- Absolutely loved the app - it was EXTREMELY helpful in all areas!! Thank you so much!
- I do not like using apps, the only reason I download is because of instructor ratings otherwise I do not use it.
- Schedule was good, app did not work well on my laptop though.



WINTER

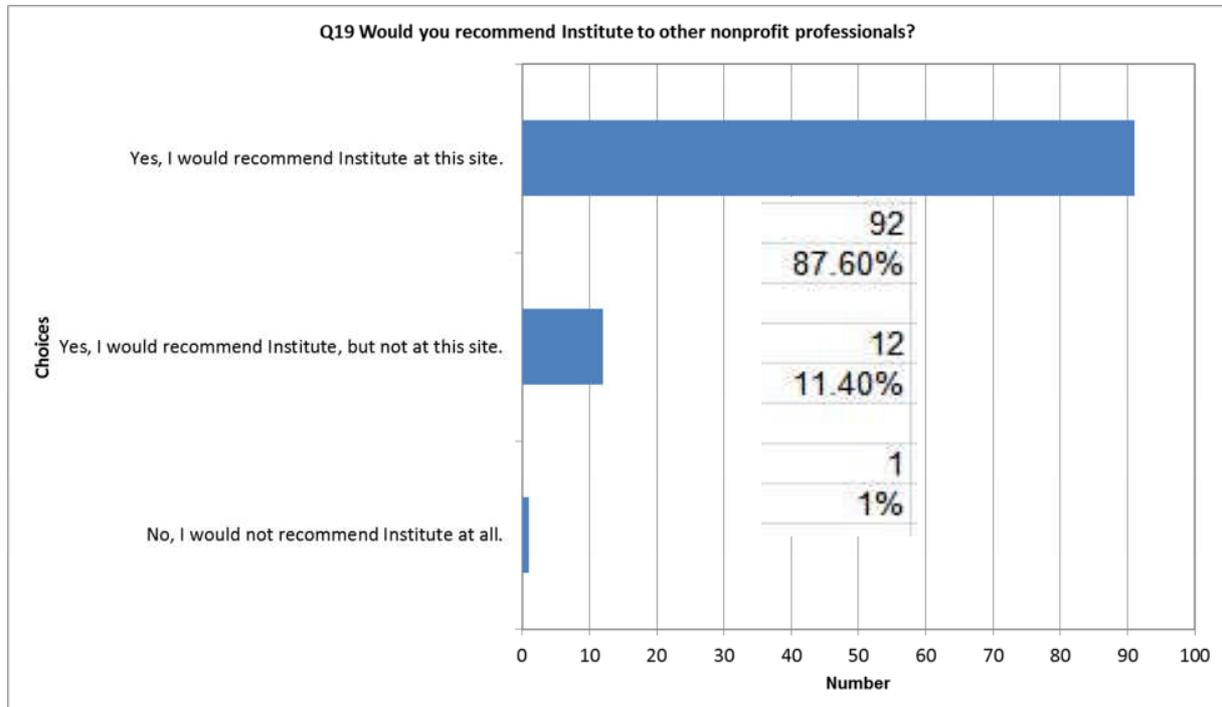
ATTENDEE SURVEY RESULTS AND FEEDBACK





WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK



Q20: Additional general comments*:

- I was hesitant to attend because of the cost, but it was well worth it. I can't wait to attend for the next three years. I know my Chamber is going to benefit from what I learned.
- I had a lot of overlap in my class content. I took *removed* Governance first year and then Policies and Procedures this year. Pretty much the same class. Then follow by Legal class with *removed* and he covered the same stuff.
- Lunch was a nightmare. While it is true that there are several places within walking distance, an hour wasn't long enough for most of the places with the walk to and from and the influx of people headed out for lunch along with the students and business folks who were already having lunch out in the area. Most days, I had to ask for it to go and bring it back to class which I hate. I don't think we need 2 30 minute breaks so cut them to 15 and give an hour and half for lunch if Institute chooses not to provide lunch again next year. I had a member of Institute staff in my class and with all the talk about how important it is to be on time and focus (i.e. not stepping out to take calls and working while in class), it was really sad to see that staff member on her phone and on her computer much of the time. From my vantage point, it was not work being done either. I did think we had exceptional speakers again this year and am overall satisfied but in addition to what I've stated above, many classes were cramped in the hotel. I liked having the banquet onsite!
- I liked the venue and staying in one location.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- At the end of each class I wanted more. The instructors were great and the hotel space was well appointed. The 1st year class was huge so getting to know each other was difficult and had we had stronger advisers they could have mitigated this better. At the end of the conference the 60 some odd of us really had great relationships and have already started to communicate about issues we are having in our positions back home. At this point I hope that 1-1 is kept together through the 4yrs. Both advisers complained that they only had 2 weeks to pre-prepare to be together and they didn't do well working with each other. It was a bit on the awkward side.
- I can tell this year was a cost-savings year because what wasn't fair the most was that when we registered, IOM advised lunch was included but was then told a month before it was not. I felt like we should have been given a refund for the amount of lunch because it was a break in registration policy. Monday was far too long and instructors should dig deeper in topics instead of skimming the surface on just the topics they are talking about.
- This is an amazing program and I am excited to see where it takes me. I think the information is invaluable to our industry. I would like to point out that there was one major drawback for me personally and that was the size of the 1st year class. One of the things I was looking forward to the most was the ability to make connections with other professionals in my class and form the bond I had heard so much about from other IOM graduates. I realize there were issues out of control, but I feel that to continue with a class this size is a disservice to us. With that in mind a split would have to be handled with care. The class naturally started splitting on their own after day one, and I feel that most if not all of us could help facilitate a way to keep that natural split together. If are only options are a random split or to stay together as one, then I guess I would say stay together. Many of us formed bonds in smaller groups and will continue those of the course of our time at IOM. I know this is a tough situation but I feel we are adult enough as a class to help make a change if that is your choice. One last point to make would be a little more care in our class dinner. I am not sure who chose ours, but all of us were quite put out by the cost of the dinner vs the quality/amount of food and time allowed at the location. Many of our employers understand the value of IOM and pay for our meals and expenses on top of our tuition and transport. I honestly felt guilty paying over \$30 for a meal before taxes/etc. I am grateful for this opportunity, just hoping to make it the best it can be.
- I can't wait for next year!



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- In general, we felt that there was a lot of "penny-pinching" happening this year. We were charged an additional \$100 (which was not accurate on the website at registration time, I found out when we were charged the extra \$100 that rates had gone up), and we got less. I realize there were last-minute changes because of scheduling, but it cost our Chamber a significant amount more to have lunch on our own every day (one of the days I paid out of my own pocket because I felt bad about the added expense). The kick-off celebration did not include food or drinks, as it had in the past - so then we had to pay for dinner that night too. There were also small things that did not go unnoticed - like the name badges no longer had a place for pens and info cards (we appreciated that in the past), there was no welcome bag with info about the week - just hand-outs we could take if we wanted. Again, small things, but it just felt like IOM was cutting back. Most of us in the Chamber or Association business run events or meetings like this, and we would all understand if someone from Institute were to say: "we needed to cut back this year because ..." or "we cut back on xyx, but in return, you're getting..." But since that didn't happen, we're just left to assume we were charged more and got less as a result. On a separate issue - we were disappointed when the board did not line up to congratulate our class, but did for the 4-2 class. This came after overhearing some rude comments from the board's table during our class speaker's remarks, so you can imagine it felt intentional, even if it was not. *Removed* did apologize for his remarks before we started class on Thursday, and that was appreciated. I just hope there can be some "lessons learned" so future classes are not discouraged like ours was.
- Loved having organized state pictures. These I think should be done at the Big Bash. We already have a professional photographer there and with the institute backdrop in the photo it looks more 'legit' for our newsletters. The instructors this year for 2-1 were AWESOME! They had great info and they kept the class engaged throughout the whole class time. Thank you for having a meet up Saturday night.
- Since I couldn't download the app on my phone I wasn't able to do any of the surveys for the speakers. The classes were all very good. I especially enjoyed the Policies & Procedures class. Please repeat that one.
- Clean it up and give some training to the volunteers on the level of professionalism expected. They truly seem to be there for the party and that is overshadowing the learning opportunities for many. This was an observation comment on to me by at least 8 other individuals at this event. I am hoping they will share their feelings on this with you as well so you hear from others. I was told my a couple of fast trackers this was the reason they fast tracked - because they were there to learn and not party and take part in the ridiculousness of those who were only there for that reason. They want the content - but not the rest of it. That is what I am finding as well.
- Too focused on chambers of commerce - not enough value for associations.
- Horrible Ethics teacher, she should be discontinued. Hotel was very run down. Had to pay for lunches, that have always been paid for with my tuition, no talk of a refund. Subject matter in classes seemed very, very basic for 3rd year students. No time in classes to debate, network, or have meaningful conversations, time wasted continually introducing ourselves.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I had a few classes that I received a few actionable items but for the amount of time out of office, I wished I learned more new ideas/ practices. I understand the concept of wanting the classes to go close to the full time frame but in multiple classes, the instructor ended early. It felt very elementary and somewhat not respectful of our time to keep us in a room without any instruction taking place.
- It was great having all the classes at the hotel!! Best experience of the four years! Industry consultations are a great benefit but the timing is poor. I was disappointed this year in that the electives I hadn't already taken but wanted to take were offered concurrently so I ended up in electives I did not want. Can Institute try to spread the elective out more during the week?
- I feel like there was false advertisement because the registration says that lunch is included in the rate; alas it was not. The website still advertises this too! I think partial refunds of tuition or reimbursements for lunches are in order. I liked that the courses were held in the hotel. It made it super convenient to get to class on time and to network.
- Some of the instructors need to retire. They are very nice people, but outmoded. I've heard the same jokes for 3 years now.
- I'm hoping the issue with the University is fixed by next Winter Institute otherwise there's no reason for us to be in Tucson. The lack of adequate conference space for the amount of people attending Winter Institute, coupled with the lack of accommodations for attendees, food preparedness on the first day, and (my own person gripe) no available coffee after lunch were a bit off putting, especially for how much Institute costs. Also, I understand that the US Chamber of Commerce Foundation puts on Winter Institute, but I would also appreciate a slightly more varied approach to the curriculum. Not all attendees were part of a chamber or association. Some of us are non-member based organizations and certification bodies that have separate issues. It was difficult in parts to find relevant information to take back to my organization from some most of the core classes.
- I am in first year. Please keep our class together in the upcoming years. Thank you!
- I loved having class at the Marriott this year for several reasons. We were able to have a more relaxed morning and enjoy breakfast inside the hotel before class. We did not have to walk 30 minutes each way. We could run up to the room during breaks if needed. I felt like we networked more in the hallways as a result of not feeling rushed. The classrooms, while not large, made our class feel more together. I liked the lunch was on our own each day because we got to explore the area. I really would encourage you to consider leaving the format the same for next year and having the classes at the Marriott.
- The Institute app was excellent and made it easy to keep up with updates, etc. I recommend to consider researching technology that allows a scan bar on the name tag so attendance can be taken more efficiently by the class advisors.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Overall it was a great learning experience. I thought majority of the instructors had good valuable information. I would suggest having more instructors like Libby Spears that make you interact with the group. In a four hour period sitting and listening to a lecture can be really long. Our class was too big. There was hardly any activities to really get to know everyone better other than after hours and after being a classroom all day soaking in information the last thing I wanted to do was go and network. The class dinner should NOT be mandatory. The first day is too long to have to go to a class dinner. Especially if you have lunch with your class required as well. It would be nice to know which breakout sessions would serve your role. For example, having a note that says "this session will help you if you're in charge of membership" or "this session will help you if you're in charge of communications." When you register for the electives it would be nice to have a short description of the breakout objective.
- As always, classes, teachers and learning experience is excellent!
- I loved having everything located at the Marriott, it was a great experience and I would love doing it that way again next year. I'm confused why there was so much cost cutting, with meals, transportation and other things. It made it more difficult for our office budget not having meals provided like last year, that were counted on as part of tuition. I was told that the whole Institute had to be switched from the college to the Marriott and readjusted only 60 days before. If this was the reason why so many things had to be cut, then that is understandable, if Institute costs were suddenly increased with little notice. If this is the case, then Institute staff has my support and respect for pulling everything together so well in such a short amount of time.
- Instructors should be challenging and not old school. I appreciate the wisdom but we are struggling to stay relevant in a changing demo and some of the instructors were not challenging and offered basic info. More group activities during the classes please. A 3.5 hour class is just too long for straight lecture with no group interaction.
- This was a great week on so many levels. Thank you for the hard work and planning to make it such a success!
- I would suggest more association specific electives since most of the core classes as well as electives wind up being Chamber-centric based on the makeup of the students and/or instructor. While I am enjoying the Institute experience as I earn credits towards the CAE, I have come to the understanding that as someone with years of experience at medium to large national associations I am not the target audience for Institute. That said, I look forward to completing year 4 this summer (I am completing Institute as a fast-tracker in two years) and will not regret my decision to chose Institute as my means for obtaining my CAE hours. I've seen it as leadership development as much or more than skill/knowledge development which I value.
- I liked that classes were at the hotel. However, our homeroom class was very small and crowded.
- The first two years of institute were very valuable. It was like drinking water through a water hose. Unfortunately, the educational level dropped off in years 3-4 and a lot was repeat from what I had already learned. Elected courses should be changed to core for 4th year students and the material should be 4th level material. The elected courses I had, was a mix of 1-4 year students so most of the time was hearing from a couple of people explaining all the issues they have at their respective chamber. As a 4th year student I had already heard these same issues and found the 1 1/2 time not utilized adequately.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I truly hope our feedback from this year proves to be beneficial this year, as I don't know that I would recommend the Winter Institute moving forward if changes are not made. I am aware that the classrooms will be back on campus and I believe that will provide us with a more comfortable learning environment, so I did not include comments on the "tight quarters". The course content met my expectations completely, however the overall Institute did not meet my expectations after attending last year.
- I felt I got more out of Institute this year than last year. Maybe it was because I've been on the job for more than a couple of months, maybe the classes felt like they applied more or were more relevant. I still wish there was more opportunity to learn from the talent in the room. I appreciated the instructors who allowed for breakouts, then summarized each groups' activities.
- It was advertised that lunch was included with our paid registration, however lunch was not offered. Partial refunds or reimbursements seem to be in order as your website specifically says "This cost includes tuition, materials, scheduled meals, breaks and receptions."
- If the date needs to be revised so be it, but classes need to be conducted on the University of Arizona campus. That is one of the main draws of Winter Institute, and the hotel meeting rooms were far to small and tight to accommodate us. I wish we'd have backed up to January 3-6 before the students arrived on January 9th and this experience would have been exponentially better (like it was last year).
- I don't think that classes that are specific to Chambers or one field should be core classes. For example, advocacy and alliances. Also, the tech class. I did get some good information but for the larger chambers that have tech people, this was not something they were very interested in because they have someone else covering it.
- Most of my networking was done during the breaks requiring me to work in the evening.
- Is there a way to designate the electives so they are geared toward each year. I selected a couple of electives that were geared more for a Class 1 versus a Class 4.
- For the additional \$100 in tuition, it seemed like we received less value - no kick off, no printed class schedules, no nice badges with our class sticker to include.
- This experience was fantastic and I am grateful for the opportunity to learn and be influenced by great speakers/instructors. I had the great opportunity to attend two different locations before graduating and felt like that was a great experience as well. Thank you for providing such a wonderful way to grow professionally!
- I was in class 2-1. Our advisory did little more then take attendance. There was no effort to build community with the class. I found her unhelpful, somewhat aloof and overall disappointing.
- There appears to be a lack of consistency with the curriculum. Instructors are given extreme latitude to cover the course objectives but not consistently. For example in one course my first year an instructor would say "never do x", Another instructor another year would say ""always do x" I realize our industry and our work is difficult to quantify and subjective. But, perhaps focusing on what is needed for accreditation and then moving back from there to design curriculum and ensure instructors are meeting expectations would be good. Again, overall really value to material. Some just felt repetitive, or contrary.
- Great job to everyone involved in the planning. I know it takes a lot of time and coordination to pull off these events and I greatly appreciate all you do!



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Due to difficulties traveling to Tuscon, it would be great if a Phoenix location would be considered. It's much more accessible with direct flights.
- I would shorten the breaks to 15 minutes and allow a longer time at lunch. Was really hard to go offsite and then be back in 1 hour.
- One of the best professional development opportunities I have ever experienced. Excited for Yr 2. Accommodations/classrooms were a little challenging. The class size was too large.
- Having all of the classes/events at the hotel really took away from the overall experience. Some of the classrooms were way too cramped/uncomfortable.
- Overall the program was very useful but it was also an exhausting schedule. Our Monday class dinner didn't get food until after 7:30pm and the networking party starting at 9pm on Tuesday seems a bit counter-productive with early classes and long days. I enjoyed myself very much but I had to return to work exhausted on Friday. I felt the set up in the rooms could have been a little more spread out. Our homeroom had a lot of empty space in the back and our rows could have been wider if space was utilized more. In one elective, it was a very claustrophobic situation with standing room only and no access to get out of your seat. I look forward to getting back on campus for better learning environments.
- I did like having everything under one roof. Made it very convenient especially this year with some physical limitations I was experiencing.
- Would like to stay as a whole class and not be split up next year.
- Great educational event. I learned more than I expected. The presenters were very knowledgeable and all gave interesting and informative presentations.
- Great learning opportunity. Recommend to anyone entering N/P field. Do it early so as to receive benefits at start of career.
- Looking forward to my fourth and final year! The class of 2020 is going to rock it with class! See you then!
- As a whole IOM seems to be regressing. The quality of instructors, content and events at the Marriott were disappointing this year. Honestly at this point I don't really see the value in finishing IOM. The only thing that would bring me back is my class. As a point of suggestion, please consider updating the classes. Teaching top level executives about customer service is a basic skill we all learned in undergrad and work experience. Topics like keeping your organization relevant, the benefits of working at a non-profit, defining your career path would be attractive and something different. Taking nearly identical classes from the same instructors with the same examples is not a good use of my organizations funds or worth my week away from the office. Hoping to see improvements next year!
- It has been a good personal development tool for management, not only in the Chamber world, but in general. I would like to see it get even more general recognition in the business world.
- As a graduate of WACE Academy, I appreciated being able to network and learn from other association professionals outside of the chamber industry but still with an emphasis in most of my classes on chamber work.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- It is very hard if you have to make last minute changes...but the hotel was not prepared for the group. Food quantity and quality was poor. Attention to special dietary restrictions was lacking. Rooms were too tight.
- Really hoping that the year 1 class for 2019 can stay together as 1 big class and NOT be separated!
- The Institute is an excellent opportunity to meet other organizations and meet new people, learn their ideals that helped them succeed in their organization. and learn what we could do to improved in our organization. The information we received was overwhelming, but very knowledgeable to help me grown as a professional, and help my organization develop successfully. The classes were very knowledgeable, made you get out of your comfort zone, and showed you how to communicate with other people. I can't wait to attend next year. I know what I learned in the Institute will help me personally and professionally with my position and with my organization.
- As a fast tracker from Southeast (in order to graduate with my class this June), my classmates in 3-2 were very welcoming and felt like I was really part of their class. They surprised me - I thought southern hospitality was only the best. 3-2 was great and loved them all!
- As my co-worker stated, "I drank the cool-aid" this year! haha. All of my electives were on point and I learned a TON. There were a few core classes that I was already well versed on but still got something out of each class. My group was an amazing class and we all gelled really well, even the fast trackers. Overall I had a REALLY great experience and I am already looking forward to next year!
- Overall, my experience was ok this year. Having lunch provided was a huge benefit in my opinion, so not having it was disappointing. Due to this, I know my food expenses were higher while the registration fee remained the same so that's something my leadership will question. Just seemed like there were a lot of cut backs this year. I did like having all the classes in the Marriott.
- I felt that the course work was below the level of participants. Some instructors used same materials in year two as they presented in year one. Disappointed to spend the same amount on tuition only to find out that lunch meals were not provided as they were last year. The additional cost was not appreciated. The time spent going off site for lunch and returning reduced the time I had to check on operations back at office.