

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

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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.

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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

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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

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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

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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