

INSTITUTE FOR ORGANIZATION MANAGEMENT



FALL BOARD MEETING

October 3-4, 2019





Institute for Organization Management



U.S. CHAMBER OF COMMERCE FOUNDATION



GENERAL INFORMATION

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

AGENDA

BOARD OF TRUSTEES, BOARDS OF REGENTS, AND CURRICULUM COMMITTEE MEETINGS
OCTOBER 3 – OCTOBER 4, 2019
U.S. CHAMBER OF COMMERCE
WASHINGTON, D.C.

THURSDAY, OCTOBER 3

- 8:30 A.M. – 9:00 A.M. **Continental Breakfast for the Curriculum Committee**
Rooms 3/4
Curriculum Committee Members Only
- 9:00 A.M. – 12:00 P.M. **Curriculum Committee Meeting**
Rooms 3/4
Curriculum Committee Members Only
- 12:00 P.M. – 12:30 P.M. **Joint Lunch**
Hall of Flags
Board of Trustees, Boards of Regents, Curriculum Committee
- 12:30 p.m. – 3:00 P.M. **Afternoon Joint Session**
Jim Johnson, IOM
Georgetown Chamber of Commerce
Hall of Flags
Board of Trustees, Boards of Regents, Curriculum Committee
- 3:00 P.M. **Hill Visits**
Schedule On Your Own
- 5:00 P.M. – 7:00 P.M. **Board Dinner**
Wilson Hardware
Board of Trustees, Boards of Regents, Curriculum Committee



GENERAL INFORMATION

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

FRIDAY, OCTOBER 4

- 8:00 A.M. – 8:30 A.M. **Continental Breakfast for the Board of Trustees**
Library
Board of Trustees Members Only
- 8:30 A.M. – 10:00 A.M. **Board of Trustees Meeting**
Library
Board of Trustees Members Only
- 10:15 A.M. – 12:00 P.M. **Boards of Regents Meetings**
Winter Board – Room 1
Midwest Board – Room 2
Southeast Board – Room 3
West Board – Daniel Webster Room
Northeast Board – Room 4
- 12:00 P.M. – 12:45 P.M. **Board Luncheon**
Cheryl Oldham
Vice President, Education Policy, U.S. Chamber of Commerce
Senior Vice President, Education & Workforce, U.S. Chamber of Commerce Foundation
Hall of Flags
Board of Trustees, Boards of Regents
- 1:00 P.M. – 2:15 P.M. **Education Session**
Nika White, IOM, DM, CDE
Nika White Consulting
Hall of Flags
Board of Trustees, Boards of Regents
- 2:15 P.M. **Formal Meeting Agenda Concludes**



GENERAL INFORMATION

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

STAFF CONTACTS

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

Karyn K. MacRae, IOM, CAE, CMP
Director
Institute for Organization Management
U.S. Chamber of Commerce Foundation
202-463-5704
kmacrae@uschamber.com

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

Mandy Pan
Associate Manager, Curriculum and Faculty
Institute for Organization Management
U.S. Chamber of Commerce Foundation
202-463-5375
mpan@uschamber.com

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

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



BOARD OF TRUSTEES

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

2019 ROSTER

CHAIR

Megan A. Lucas, IOM, CCE, CEcD
CEO 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
573-874-1132
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

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

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

David Johnson, IOM, CAE

Vice President, Membership and Volunteer
Engagement
Association of Women's Health, Obstetric &
Neonatal Nurses (AWHONN)
1800 M Street, NW, Suite 740 South
Washington, DC 20036
202-261-2454
djohnsondj@gmail.com
Term: 2015-2019

Jack Lank, IOM

President and CEO
The United Regional Chamber of Commerce
310 South Street
Plainville, MA 02762
508-316-0861
jack@unitedregionalchamber.org
Term: 2017-2020

Robert Medler, IOM

Vice President
Tucson Metro Chamber
PO Box 991
Tucson, AZ 85701
520-792-2250
rmedler@tucsonchamber.org
Term: Through 2020

Mark L. Field, IOM, CCE

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

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

COO and Executive Vice President
Lynchburg Regional Business Alliance
300 Lucado Place
Lynchburg, VA 24504
434-845-5968
ckennedy@lynchburgregion.org
Term: Through 2019

Kelle Marsalis, IOM, CCE

Interim President and CEO
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 03304
603-224-2369
pmcnamara@nhada.com
Term: Through 2019

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

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

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

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

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

Scott Waller, IOM

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

BOARD OF TRUSTEES AGENDA



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

FALL 2019 MEETING

OCTOBER 4, 2019
8:30 A.M.–10:00 A.M. EDT
U.S. CHAMBER OF COMMERCE
WASHINGTON, D.C.

I. Welcome and Introductions

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

II. Approval of Minutes

February 5, 2019

III. Approval of Nominating Committee Reports

IV. Consent Agenda

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

V. Curriculum Committee Report

VI. Updates and Brainstorming

- a. West Institute

VII. Chairman's Report

VIII. Looking Ahead

Jeremy L. Arthur, IOM, CCE
Chair Elect, Institute for Organization Management National Board of Trustees
President and CEO, Chamber of Commerce Association of Alabama

IX. Other Business

X. Adjournment

Next Meeting via Conference Call: February 4, 2020 from 11:30 a.m. to 1:00 p.m. EST
Next In-Person Meeting: September 25, 2020, Washington, DC

BOARD OF TRUSTEES AGENDA



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

2019 WINTER MEETING MINUTES

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

In attendance: Megan A. Lucas, IOM, CCE, CEcD; Jeremy L. Arthur, IOM; Matt R. McCormick, IOM, CCE; Chris E. Wallace, IOM, CCE; Christin W. Berry, CAE; Rich Cantillon, IOM; Kimberly Dahlsten, IOM; Tony Felker, IOM, CCE; Mark L. Field, IOM, CCE; Christine Kennedy, IOM, CCE, CPC, ELI-MP; Nick Kieffer, IOM, CP; Jack Lank, IOM; Kelle Marsalis, IOM, CCE; Stephanie M. Parton, IOM, CAE; Jodie Perry, IOM, CCE, CCEO-AP; Gene Terry, IOM, CAE; Scott Waller, IOM; Angie Whitcomb, IOM; Raymond P. Towle, IOM, CAE; Karyn K. MacRae, IOM, CAE, CMP; Caitlin C. Gayles; Katelynne G. Cox; Andrew Y. Weller, IOM; Megan Kastner

Not in attendance: Steve Clark, IOM, CFE, J.D.; DJ Johnson, IOM, CAE; Crystal Moore, CAE; Peter J. McNamara, IOM, CAE, J.D.

I. **Welcome and Introductions**

Megan A. Lucas, IOM, CCE, CEcD welcomed everyone to the call and roll was called.

II. **Approval of Minutes**

The minutes from the October 5, 2018 meeting were unanimously approved.

III. **Approval of Nominating Committee Report**

The Board of Trustees, Curriculum Committee, and Winter Board of Regents nominating committee reports were all approved. The Winter Board of Regents nominating committee report was approved with an amendment (included below).

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

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

BOARD OF TRUSTEES AGENDA



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

2019 WINTER MEETING MINUTES

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

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

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

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

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

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

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

BOARD OF TRUSTEES AGENDA



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

2019 WINTER MEETING MINUTES

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

ROTATING OFF BOARD

Stephanie M. Parton, IOM, CAE
Vice President, Communications
Indiana CPA Society
Indianapolis, IN
Term: 2012-2019

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

IV. Program Updates

Staff provided overviews of various aspects of the program.

- a. Marketing (Andrew Y. Weller, IOM)
 - Ads were placed in ACCE's *Chamber Executive* magazine.
 - A banner advertisement is currently online on ASAE's website through March, highlighting summer registration.
 - A postcard mailing went out in the fall advertising 2019 dates to thousands of recipients.
 - The Institute planner is once again the largest marketing piece and was completed within guidelines of past years again.
 - Institute will have an on-site presence at multiple conferences with table materials this year, including W.A.C.E., MAKO, and ACCE.
 - Screen cleaners are being redesigned with an updated testimonial for the 2019 conference season. These will be placed in attendee bags at MAKO.
- b. Social Media (Andrew Y. Weller, IOM)
 - Social media followers increased across all platforms in the past year.
 - The #TestimonialTuesday and #SessionSpotlight campaigns focused on Facebook and Instagram were successful and supported growth and engagement.
 - A new social media campaign, #ROIInstitute, will focus on the benefits of implementing Institute-learned skills after graduation, demonstrating real ROI.
 - On-site social media was slightly down during Winter Institute, most likely as a result of increased social activity on the new app and less tweeting.
- c. Scholarships and Fundraising (Katelynne G. Cox)
 - 2019 Winter raised \$11,919.57 on-site through the silent auction and run.
 - Letters for requesting auction items have been sent to all committee members.
 - An internal change was made resulting in #GivingTuesday funds shifting to impact the following year. Therefore, all donations made on #GivingTuesday in 2018 will be available for use in 2020.
 - Registration donations for scholarships are now split evenly across sites.
 - To date, five State Partner Scholarship (SPS) partners plan to send a total of ten people to 2019 Institute sites.

BOARD OF TRUSTEES AGENDA



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

2019 WINTER MEETING MINUTES

- d. Winter Geographic Breakdown (Megan Kastner)
- The 2019 Winter Institute goal was 240 overall attendees, with 63 first-years. Final numbers were just shy of the overall goal with 238 total attendees, 64 of which were first-years.
 - The majority of attendees came from chambers, at 61.69%, in comparison to associations, at 25.63%. The other 10.07% came from other organizations.
 - The majority of attendees were senior executives or department heads and ranged in age from 31-40 years old.
 - The greatest representation was from Texas, with 28 attendees.
 - The top state increases since last year were Maine and South Carolina, both with four more attendees.
- e. Curriculum (Caitlin C. Gayles)
- The on-site app using the new platform, CrowdCompass, launched at Winter. It was very user-friendly and received great reviews.
 - Through the capabilities of CrowdCompass, paper schedules were no longer printed/distributed, and attendees were able to change their electives on-site through the app.
 - An example course evaluation was referenced.
 - The selection of courses audited were changed in the Curriculum Committee meeting.
 - The newest class, E150 Diversity, Equity, and Inclusion will be offered at all summer sites. Staff is looking forward to seeing how it is implemented and received.
- f. ASAE and ACCE Partnerships (Karyn K. MacRae, IOM, CAE, CMP)
- Recognition was given to Christin Berry and DJ Johnson for helping to facilitate conversations with key contacts at ASAE.
 - Institute is working to build upon its relationship with ASAE in order to help educate and spread awareness about the available programs and resources from each organization.
 - The goal is to increase association representation at Institute, thus cultivating more CAE candidates.
 - Discussions are in the works, and Institute hopes to have a presence at ASAE's Annual Meeting.
 - Recognition was given to Crystal Moore, Kelle Marsalis, Tony Felker, Brad Lacy, Jason Camis, and the entire West Board of Regents for helping to turn the original conflict of dates into a wonderful opportunity.
 - Both organizations are cross-promoting ACCE's Annual Meeting and West Institute through various boards, councils, and committees, in addition to in promotional language.
 - Institute is offering a \$200 discount off tuition for anyone attending both programs. It was noted that the use of discount codes must be used at the time of registration.

BOARD OF TRUSTEES AGENDA



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

2019 WINTER MEETING MINUTES

V. Boards of Regents' Reports

The Board of Regents Chairs shared an overview of their reports, highlighting successes and opportunities.

- a. Winter Board of Regents report
Nick Kieffer, IOM, CP reported on the success of 2019 Winter Institute, highlighting the fact that logistical challenges were handled well. On-site fundraising was an overwhelming success, and attendee feedback was mostly positive.
- b. Midwest Board of Regents report
Angie Whitcomb, IOM shared that the Midwest regents are focusing on diversifying attendees at the Midwest location, paying special attention to increasing association representation. Regents were recognized for each donating to #GivingTuesday to fund a full tuition scholarship.
- c. Southeast Board of Regents report
Christine Kennedy, IOM, CCE, CPC, ELI-MP echoed the Southeast board's focus on increasing association representation. The board is focusing on the power of personal stories in their recruitment efforts.
- d. West Board of Regents report
Tony Felker, IOM, CCE shared that the West board is continuing their focus on strong fundraising efforts. They look forward to the opportunity for increased attendance as a result of the ACCE partnership and will promote diversity. Feedback was requested for suggestions on how to increase energy on-site, as well as how to help grow the West site.
- e. Northeast Board of Regents report
Due to a scheduling conflict, the Northeast report was not delivered on the call.

VI. Chairman's Report

Megan A. Lucas, IOM, CCE, CEcD delivered her chairman's report, which included the points below.

- The Curriculum Committee was recognized for their work and the group was reminded that curriculum changes made at the 2018 Fall Board Meeting were incorporated at 2019 Winter, with the exception of the addition of the E150 elective.
- Nick Kieffer and the rest of the Winter Board of Regents were congratulated on a successful week.
- Megan shared her positive experience while on-site at Winter Institute, including the strong cohesion of the Board of Regents, as well as the success and user friendliness of the new on-site app.
- Megan expressed excitement for the remaining four summer sites, and reminded the trustees to encourage attendance at all five sites.
- Congratulations were given to Caitlin Gayles on her promotion to Manager, Institute for Organization Management.

BOARD OF TRUSTEES AGENDA



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

2019 WINTER MEETING MINUTES

VII. Other Business

There was no additional business to discuss.

VIII. Adjournment

Excitement for 2019 was expressed and everyone was encouraged to continue to promote the program.

There being no other business the meeting was adjourned.

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



NOMINATIONS

2020 BOARD OF TRUSTEES

Chair

Jeremy L. Arthur, IOM, CCE
President and CEO
Chamber of Commerce Association of Alabama
Montgomery, AL
Term: 2019-2020

Chair Elect

Matt R. McCormick, IOM, CCE
President
Columbia Chamber of Commerce
Columbia, MO
Term: 2019-2020

Vice Chair

Kelle Marsalis, IOM, CCE
Interim President and CEO
Plano Chamber
Plano, TX
Term: 2019-2020

Past Chair

Megan A. Lucas, IOM, CCE, CEcD
CEO and Chief Economic Development Officer
Lynchburg Regional Chamber Alliance
Lynchburg, VA
Term: 2019-2020

Board of Regents Chairs (one-year term):

Robert Medler, IOM
Vice President
Tucson Metro Chamber of Commerce
Tucson, AZ
Term: Through 2020 *as Chair of Winter Board of Regents (confirmed February 5, 2019)*

Jeff Griffin, IOM
President and CEO
Peoria Chamber of Commerce & The CEO Council
Peoria, IL
Term: Through 2020 *as Chair of Midwest Board of Regents*



NOMINATIONS

2020 BOARD OF TRUSTEES

Teri Smiley, IOM, GCCE
President
Walton County Chamber of Commerce
Monroe, GA
Term: Through 2020 *as Chair of Southeast Board of Regents*

Ryan Evans, IOM
Executive Director
Chambers for Innovation and Clean Energy
Sandy, UT
Term: Through 2020 *as Chair of West Board of Regents*

Douglas O'Flaherty, IOM
South Carolina Director of Operations
South Carolina Restaurant and Lodging Association
Columbia, SC
Term: Through 2020 *as Chair of Northeast Board of Regents*

Curriculum Committee Chair:

Matt R. McCormick, IOM, CCE
President
Columbia Chamber of Commerce
Columbia, MO
Term: Through 2021 *as Chair of Curriculum Committee*

At-large position (two-year term):

Nick Kieffer, IOM, CP
President and CEO
Goshen Chamber of Commerce
Goshen, IN
Term: 2019-2021

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

Steve Clark, IOM, CFE, J.D.
President and CEO
Fayetteville Chamber of Commerce
Fayetteville, NC
Term: 2018-2020

Kimberly Dahlsten, IOM
Vice President of Operations
Catawba County Chamber of Commerce
Hickory, NC
Term: 2018-2020



NOMINATIONS

2020 BOARD OF TRUSTEES

Gene Terry, IOM, CAE
Executive Director, American Society of Hand Therapists
Association Headquarters, Inc.
Mt. Laurel, NJ
Term: 2018-2020

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

DJ Johnson, IOM, CAE
Vice President, Membership and Volunteer Engagement
Association of Women's Health, Obstetric & Neonatal Nurses (AWHONN)
Washington, DC
Term: 2015-2021

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):

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)*



NOMINATIONS

2020 BOARD OF TRUSTEES

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

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

ROTATING OFF BOARD

Board of Regents Chairs (one-year term):

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



NOMINATIONS

2020 BOARD OF TRUSTEES

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

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

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

Past Chair:

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



NOMINATIONS

2020 CURRICULUM COMMITTEE

Chair

Matt R. McCormick, IOM, CCE
President
Columbia Chamber of Commerce
Columbia, MO
Term: 2019-2021

Vice Chair

Morri Yancy, IOM
President
Lake Guntersville Chamber of Commerce
Guntersville, AL
Term: 2019-2021

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

Jenna Armstrong, IOM
Chief Executive Officer
Lake Houston Area Chamber of Commerce
Humble, TX
Term: 2019-2020 *as Vice Chair of Midwest Board of Regents*

Erin Carney, IOM
President
Metrocrest Chamber of Commerce
Carrollton, TX
Term: 2019-2020 *as Vice Chair of Winter Board of Regents (confirmed February 2019)*

Lisa Hermes, IOM, CCE
President and CEO
McKinney Chamber of Commerce
McKinney, TX
Term: 2019-2020 *as Vice Chair of West Board of Regents*

Pammie Jimmar, IOM
Vice President, Small Business and Events
Huntsville-Madison County Chamber
Huntsville, AL
Term: 2019-2020 *as Vice Chair of Southeast Board of Regents*

Michael Smith, IOM, CAE, CPA
Chief Business Officer
Solar Energy Industries Association
Washington, DC
Term: 2019-2020 *as Vice Chair of Northeast Board of Regents*



NOMINATIONS

2020 CURRICULUM COMMITTEE

At-large (two-year term):

Christine Kennedy, IOM, CCE, CPC, ELI-MP
COO and Executive Vice President
Lynchburg Regional Business Alliance
Lynchburg, VA
Term: 2019-2021

Robert Medler, IOM
Vice President
Tucson Metro Chamber
Tucson, AZ
Term: 2019-2021

Libby Spears
Owner
Bravo cc
Lantana, TX
Term: 2019-2021

Term Renewals (two-year term):

Desiree Bennyhoff, IOM, ACE
President and CEO
Edwardsville/Glen Carbon Chamber of Commerce
Edwardsville, IL
Term: 2017-2021

Kelle Marsalis, IOM, CCE
Interim President and CEO
Plano Chamber
Plano, TX
Term: 2017-2021

Allison B. Walden, IOM, CFRE
Senior Vice President of Resource Development
Tulsa Regional Chamber
Tulsa, OK
Term: 2017-2021

Faculty Member (two-year term):

Steven Swafford, IOM, Ed.D.
Balance Warrior and CEO
Leadership Outfitters
Santa Monica, CA
Term: 2015-2021



NOMINATIONS

2020 CURRICULUM COMMITTEE

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

Faculty Member (two-year term):

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

At-large (two-year term):

Lowell Aplebaum, CAE, CPF
CEO and Strategy Catalyst
Vista Cova, LLC
Gaithersburg, MD
Term 2018-2020

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

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



NOMINATIONS

2020 CURRICULUM COMMITTEE

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

ROTATING OFF COMMITTEE

Chair:

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

At-Large:

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

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

Ryan Evans, IOM
Executive Director
Chambers for Innovation and Clean Energy
Sandy, UT
Term: 2018-2019 *as Vice Chair of West Board of Regents*

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

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

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



NOMINATIONS

2020 MIDWEST BOARD OF REGENTS

Chair

Jeffrey Griffin, IOM
President and CEO
Peoria Area Chamber of Commerce and The CEO Council
Peoria, IL
Term: 2019-2020

Vice Chair

Jenna Armstrong, IOM
Chief Executive Officer
Lake Houston Area Chamber of Commerce
Humble, TX
Term: 2019-2020

Past Chair

Angela Whitcomb, IOM
President
Shakopee Chamber of Commerce
Shakopee, MN
Term: 2019-2020

The following individuals are nominated:

Justin Groenert, IOM
Vice President, Public Policy
Chattanooga Area Chamber of Commerce
Chattanooga, TN
Term: 2019-2021

Charlie Moore, IOM, CCE
President and CEO
McLean County Chamber of Commerce
Bloomington, IL
Term: 2019-2021

Term Renewals (two-year term):

Tracey Halliday, IOM
Vice President, Communications
American Beverage Association
Washington, DC
Term: 2015-2021



NOMINATIONS

2020 MIDWEST BOARD OF REGENTS

Peter Murphy, IOM
President and CEO
Illinois Association of Park Districts
Springfield, IL
Term: 2017-2021

Heidi Zich, IOM
Executive Vice President
Home Builders Association of the Fox Cities
Appleton, WI
Term: 2015-2021

REMAINING ON BOARD, NO ACTION REQUIRED

Jason Ball, IOM, CEcD
President and CEO
Round Rock Chamber of Commerce
Round Rock, TX
Term: 2018-2020

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

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

Corey Hutcherson, IOM
Vice President, Community Relations
Wake Forest Area Chamber of Commerce
Wake Forest, NC
Term: 2018-2020



NOMINATIONS

2020 MIDWEST BOARD OF REGENTS

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

ROTATING OFF BOARD

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

Dawn Johnson, IOM
Vice President
Muskegon Lakeshore Chamber of Commerce
Muskegon, MI
Term: 2012-2019

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



NOMINATIONS

2020 SOUTHEAST BOARD OF REGENTS

Chair

Teri H. Smiley, IOM, GCCE
President
Walton County Chamber of Commerce
Walton, GA
Term: 2019-2020

Vice Chair

Pammie Jimmar, IOM
Small Business and Events Director
Chamber of Commerce of Huntsville/Madison County
Huntsville, AL
Term: 2019-2020

Past Chair

Christine Kennedy, IOM, CCE, CPC, ELI-MP
COO and Executive Vice President
Lynchburg Regional Business Alliance
Lynchburg, VA
Term: 2019-2020

The following individuals are nominated:

Tammi Ford, IOM
Vice President, Chamber Operations
Blount Partnership
Maryville, TN
Term: 2019-2021

Cory Skeates, IOM, FCCP, J.D.
President
Lakeland Area Chamber of Commerce
Lakeland, FL
Term: 2019-2021

Judd Wilson, IOM
Vice President, Chamber of Commerce
Community Development Foundation
Tupelo, MS
Term: 2019-2021



NOMINATIONS

2020 SOUTHEAST BOARD OF REGENTS

Term Renewals (two-year term):

Skip Alford, IOM, FCCP
President and CEO
Greater Palm Harbor Chamber of Commerce
Palm Harbor, FL
Term: 2017-2021

Beth Morrison, IOM
Vice President of Member Services
Greater Dalton Chamber of Commerce
Dalton, GA
Term: 2017-2021

Rick Roden, IOM
President and CEO
Greater Jackson County Chamber of Commerce
Scottsboro, AL
Term: 2015-2021

Carlton Tidwell, IOM
President
Terrell Chamber of Commerce
Terrell, TX
Term: 2017-2021

REMAINING ON BOARD, NO ACTION REQUIRED

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



NOMINATIONS

2020 SOUTHEAST BOARD OF REGENTS

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

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

ROTATING OFF BOARD

Bryan Daniels, IOM, CCE, CEcD
President and CEO
Blount Partnership
Maryville, TN
Term: 2012-2019

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

Michelle Kiely, IOM
Vice President of Development
Make-a-Wish East Tennessee
Chattanooga, TN
Term: 2017-2019

Ray Villegas, IOM
Term: 2015-2019

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



NOMINATIONS

2020 WEST BOARD OF REGENTS

Chair

Ryan Evans, IOM
Executive Director
Chambers for Innovation and Clean Energy
Sandy, UT
Term: 2019-2020

Vice Chair

Lisa Hermes, IOM, CCE
President
McKinney Chamber of Commerce
McKinney, TX
Term: 2019-2020

Past Chair

Tony Felker, IOM, CCE
President and CEO
Frisco Chamber of Commerce
Frisco, TX
Term: 2019-2020

The following individuals are nominated:

Josh Bonner, IOM
President and CEO
Greater Coachella Valley Chamber of Commerce
Indio, CA
Term: 2019-2021

Laura Grimes, IOM
Chief Financial Officer
Conway Area Chamber of Commerce
Conway, AR
Term: 2019-2021

Shontel Mays, IOM
Chief Executive Officer
Pflugerville Chamber of Commerce
Pflugerville, TX
Term: 2019-2021



NOMINATIONS

2020 WEST BOARD OF REGENTS

Term Renewals (two-year term):

Jason E. Camis, IOM
President and CEO
Gardner Edgerton Chamber of Commerce
Gardner, KS
Term: 2015-2021

Robert Newman, IOM, CAE
Vice President and CFO
Independent Film and Television Alliance
Los Angeles, CA
Term: 2017-2021

REMAINING ON BOARD, NO ACTION REQUIRED

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

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

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

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

Katie Stice, IOM, ACE
Executive Director
Rancho Mirage Chamber of Commerce
Rancho Mirage, CA
Term: 2016-2020



NOMINATIONS

2020 WEST BOARD OF REGENTS

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

ROTATING OFF BOARD

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

Mike Greene, IOM
Washington, DC
Term: 2018-2020

Brad Lacy, IOM, CCE
President and CEO
Conway Area Chamber of Commerce
Conway, AR
Term: 2011-2019

Kelle Marsalis, IOM, CCE
Interim President and CEO
Plano Chamber
Plano, TX
Term: 2013-2019

Heidi Peterson, IOM
Executive Director
Wyoming State Chamber of Commerce
Laramie, WY
Term: 2015-2019



NOMINATIONS

2020 NORTHEAST BOARD OF REGENTS

Chair

Douglas O'Flaherty, IOM
South Carolina Director of Operations
South Carolina Restaurant and Lodging Association
Columbia, SC
Term: 2019-2020

Vice Chair

Michael Smith, IOM, CAE, CPA
Chief Business Officer
Solar Energy Industries Association
Washington, DC
Term: 2019-2020

Past Chair

Peter J. McNamara, IOM, CAE, J.D.
President
New Hampshire Automobile Dealers Association
Concord, NH
Term: 2019-2020

The following individuals are nominated:

Roy McGrath, IOM, CAE
Chief Executive Officer
Maryland Environmental Service
Millersville, MD
Term: 2019-2021

Donna Morris, IOM
President
Greater Salem Chamber of Commerce
Salem, NH
Term: 2019-2021

Term Renewals (two-year term):

Kate Conroy, IOM
Director, Member Services and Programs
New Jersey Business & Industry Association
Trenton, NJ
Term: 2015-2021



NOMINATIONS

2020 NORTHEAST BOARD OF REGENTS

Cheryl Kuhn, IOM
President and CEO
Southern Chester County Chamber of Commerce
West Grove, PA
Term: 2017-2021

REMAINING ON BOARD, NO ACTION REQUIRED

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

Amy Hager, IOM, CAE
Director of Communications
Virginia Chamber of Commerce
Richmond, VA
Term: 2018-2020

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



NOMINATIONS

2020 NORTHEAST BOARD OF REGENTS

ROTATING OFF BOARD

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

Carrie Stuart, IOM
President
Gettysburg Adams Chamber of Commerce
Gettysburg, PA
Term: 2012-2019

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



CONSENT AGENDA

WINTER CHAIRMAN'S REPORT, FALL 2019

On behalf of the entire Winter Board of Regents, I'd like to begin by thanking the 2019 Chair, Nick Kieffer, IOM, CP, for his enthusiasm, dedication, and friendship. Nick's leadership on-site in January led to a successful Institute in the face of significant adversity, and attendees reaped the rewards of his leadership. Thank you, Nick.

The final attendance numbers are as follows:

- First-Year Attendees: 64 with the goal of 63, a 101.6% success rate
- Overall Enrollment: 238, with the goal of 240, a 99.2% success rate
- Association Representation: 63, or 26.5% of attendees

The final fundraising numbers for the 2019 Winter site are as follows:

- On-Site Silent Auction raised \$10,707.28
- 5K Scholarship Run raised \$1,212.29
- On-site donations raised \$5,021.00
- Total: \$16,940.57 with the goal of \$10,000, a 169.41% success rate

A long-standing tradition for the Winter Board is our ongoing communication throughout the year via email. Short, concise emails were sent to board members regularly with a variety of content and will continue until we are on-site in January. Andrew and the IOM team created effective social media resources throughout the year that we strongly encourage everyone on our board to share in their peer groups to drive recruitment, as well as present to professional groups throughout our networks to attract attendees.

Class Advisors, as we all know, play a vital role in the attendee experience and how the week progresses. Our slate of Class Advisors in 2019 were topnotch and they handled our "opportunities" extremely well. The idea of having advisors "self-select" into the role, rather than having been searched for and asked, proved to work well, as we did not have any late cancellations or other issues that occasionally plague volunteers. Furthermore, pairing our regents with Class Advisors as Regent Partners has once again proved to be extremely helpful in creating a great experience for attendees.

As for best practices, our silent auction leaned towards packaging items this past year to make larger gifts and experiences available. This led to significant increases in average bid amounts, and continued the fun of Bidr and competitive bidding for scholarships.

Registration was also run by the Class Advisors and Regent Partners from their respective classes. This connected names with faces and allowed for an exemplary level of customer service to be delivered from the onset of our week in Tucson.

As 2020 Winter is quickly approaching, our goals have been set and we are working diligently to exceed them. Our attendance goals are set at 223 overall, 68 of which are first-years, and over 30% association representation. Our fundraising goal is set at \$12,500. We also have adopted goals for customer service



CONSENT AGENDA

WINTER CHAIRMAN'S REPORT, FALL 2019

based on the attendee post-site survey results. Our team is already in the process of executing our plans and are eagerly looking forward to January.

We, as the Winter Board of Regents, would like to thank Raymond, Karyn, and the entire staff for how hard they worked this past year. Their dedication and professionalism make serving on the Winter Board of Regents a pleasure.

Finally, while I am the one who has the privilege of presenting this report, there are many who do the work. The Winter team is a family and passionately dedicated to Institute. They are innovators who work tirelessly to make each year better than the last – ensuring attendees have the best experience possible. They are the best of the best and I am truly honored to serve them as Chair.

Submitted by: Robert Medler, IOM
Chair, Winter Board of Regents



CONSENT AGENDA

MIDWEST CHAIRMAN'S REPORT, FALL 2019

On behalf of the attendees, faculty, Class Advisors, and my colleagues on the Midwest Board of Regents, it is my honor to deliver the yearend report for Midwest Institute.

When we gathered in D.C. last October to start planning, we were focused on three areas: recruitment and retention, customer experience, and of course fundraising.

The goals set for us by staff were lower than they've been in years past, and being a competitive group, that didn't sit well with us. We spent the year laser focused on recruitment, and I'm proud to report that our final enrollment number was 146 with 43 of those being first-years, hitting 111% of our goal. We exceeded numbers for first- through third-years, even with the transition to one first-year class instead of two. We missed the fourth-year retention goal by two.

We were also focused on diversifying our attendance between chambers and associations. Several of us presented at our State Association events, as well as made cold calls to associations in our respective areas that we'd not connected with before. Believing that seeds planted today will help us grow in the future, we also worked on calling people from Institute's prospect list. While that may not have netted as many results as we'd hoped, it allowed us to help staff update that information, making that list more effective for future years.

We had several successes this year on-site, with our biggest being fundraising. I'm very proud to report this fact, especially since historically our site has not been a fundraising leader. Our board made a commitment to raise enough money amongst ourselves for a full scholarship on Giving Tuesday, raising \$1,455. Our on-site auction and fundraising efforts raised over \$4,400 for Midwest Scholarships and \$1,197 for National Scholarships through the INVESTED program. We want to recognize and thank Institute Staff for the implementation of the Bidr platform, which helped our efforts tremendously.

Another big success was the addition of an after hours bonus session on Tuesday night. Corey Hutcherson, IOM organized a fantastic Best Practices After Hours event at the Fluno Center. Participants were invited to share their best practices via the Tricider Web Platform. The group voted on the best ideas in the categories of events, non-dues revenue, and membership, and prizes were awarded. We had twice as many attendees as we anticipated, and a good representation from all four years, including faculty. This turned an unscheduled night on a long class day, where we would have typically all gone our separate ways in small groups, into a great networking, bonding, and idea sharing night.

Under the leadership of incoming board chair Jeff Griffin, IOM we will continue to focus on our recruitment and industry diversification efforts. There will also continue to be a focus on leveraging relationships with recent graduates, encouraging them to send their staff through the program, or to help spread the word by reaching out to other organizations in their communities. Recruitment, retention, and relationships have been a focus of this board since before I joined it. Midwest has consistently received high marks on customer service and on-site experiences. We will continue to make this a focus with industry consultations and strong Regent Partnership relationships.



CONSENT AGENDA

MIDWEST CHAIRMAN'S REPORT, FALL 2019

Our social media efforts were once again structured and scheduled, with Jenna Armstrong, IOM leading the initiative to keep the board on track with pre-scheduled post times and messaging leading up to our week on-site, as well as the week after. We will continue to tweak and revise our social media strategy as we keep up with technology and the on-site app.

2019 Midwest Institute was by all accounts a success. And as much as we can report on what WE as a board did, the successes we recognized are due in a large part to the incredible IOM staff. Without their organization and innovative minds, attention to detail, and impressive ability to herd cats, none of this would be possible. On behalf of the entire Midwest Board of Regents, we say thank you.

It has been an honor to serve as Chair this year, and for the last five years with the incredible Midwest team. I look forward to next year's leadership under Jeff Griffin and seeing what other great things we can accomplish together in Madison.

Submitted by: Angela Whitcomb, IOM
Chair, Midwest Board of Regents



CONSENT AGENDA

SOUTHEAST CHAIRMAN'S REPORT, FALL 2019

Greetings from Virginia! It has been an honor to serve as chair of Southeast Institute and to serve the profession that I love. Our goal was 246 attendees and we reached 97% of that goal. We also had a goal of 86 first-year attendees and we finished with 70, resulting in 81% of goal.

Our challenge continues to be attendee diversification, as we are a “Chamber heavy site.” We reached out to associations and encouraged registration, which resulted in 21 attendees. This will remain a strategic priority as we attempt to grow this number.

But beyond just numbers, as we wrapped up Institute, our board discussed Southeast success as measured by several things:

- The resurrection of an opening reception with special thanks going to the Georgia Chamber, Athens Chamber, and PSP Group, who all sponsored this event at a local brewery.
- The addition of class ambassadors, who were voluntarily solicited by our board members, greeted the attendees, provided information about general logistics, and assisted with state photos when needed. These third- and fourth-year attendees provided a peer-to-peer connection with the students and helped Institute express our collective appreciation and acknowledgement for their participation in the program.
- Southern hospitality through regent visibility and engagement. We set the goal to be as hospitable and visible as possible so the students truly felt our passion for Institute and their attendance. We implemented a new format at Kickoff involving creative introductions. We visited every class on the first day and continued our tradition of playing music each day to get the attendees pumped up. And, as I walked around at breaks and in the dining hall every day, I noticed our board members conducting industry consultations and chatting with attendees to ensure they were making the most of their Institute experience.
- Social media engagement resulted in increases in all forms of social media promotion and engagement and we attribute that to our board being very “social media” savvy! Last year, we spoke at the Fall Board Meeting about how we would grow Institute through emphasizing the power of the personal story. Because business IS personal. Institute IS personal. We challenged each other to schedule just 30 minutes on a recurring basis to do personal outreach--to share personal stories on how Institute can make a difference in your life. This was meant to keep Institute top of mind for busy professionals and to cut through the “noise of mass communications.” We believe Southeast was successful because we did this and we modeled Southern Hospitality!



CONSENT AGENDA

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

SOUTHEAST CHAIRMAN'S REPORT, FALL 2019

Serving Institute has been such a rewarding experience and I am sure you would agree that engagement with IOM refuels you as you lead in your respective communities. As we embark on yet another year, our Southeast site will excel under the leadership of Teri Smiley, IOM, GCCE, who leads with wisdom, joy, and passion.

Thank you Institute staff, Board of Trustees, and fellow Board of Regents members for serving and leading!

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



CONSENT AGENDA

WEST CHAIRMAN'S REPORT, FALL 2019

On behalf of the West Board of Regents, I am pleased to give an overview from our 2019 West experience. While this year's West Institute faced a number of unusual and/or continuing issues, the overall experience had by our students, as well as our volunteers, was amazing, and I believe the overall energy and engagement this year was at a very high level!

West Institute hosted a total of 104 attendees this year, 34 of which were first-year students, up from 31 the previous year. The stated goals were 95 and 32, respectively, so our group exceeded goals by roughly 10% in both categories. Once again, we had a very diverse attendance with attendees from over 25 different states, but the largest number from any one state was again Texas! As will be detailed below, we were pleased with the overall numbers given certain challenges/opportunities thrown our way, but those same issues will provide new areas of attention in the coming year(s).

In 2017, the board identified several strategies to increase enrollment and remains committed to them for the future. The two strategies best suited for our site include a focus on metro chamber staff and utilizing a more geographically and industry diverse Board of Regents. While we still believe that metro chambers are a great untapped resource for the program, we have not yet been able to see tangible results in this area. Conversely, our strategic efforts to further diversify our board have produced results in reaching into new markets and to further increase the number of associations coming to West. For now, we intend to continue said strategies, but we will be evaluating throughout the process.

Our biggest success this year was working closely with an incredible Institute staff to make the most of the challenges created as a result of ACCE scheduling their national conference at the same time as West, and just next door in Long Beach. While this was initially viewed as a challenge, the board and staff worked tirelessly to turn it into an opportunity. Specific actions/ideas that were implemented included shifting West by four days to start immediately after the conclusion of Long Beach, working with ACCE to offer a package discount for those attending both events, playing up the "one flight only/two events" angle of things, and hopefully having more people in the area and getting to know the California environment that makes West such a fabulous venue and site.

Also, an additional success was a new event – our "Kickoff Bowling Night" – that proved to be a great and relatively inexpensive way to engage new attendees and get to know returning students in a fun environment. The event was estimated to have over 40 participants. And, continuing on our strong tradition of fundraising, we had another strong year raising just shy of \$8,000 through various means, including our on-site silent and live auctions.

In addition to the ACCE scheduling challenge, West experienced a number of campus/site factors that impacted many areas of the West experience. Staff is working with LMU to try and resolve and improve upon these factors, but with these being ongoing issues for several years now, it does raise questions in terms of the venue and facilities for coming years.



CONSENT AGENDA

WEST CHAIRMAN'S REPORT, FALL 2019

Also, while the ACCE location and schedule ended up working to our advantage this year and likely contributed to higher enrollment numbers, we will be faced with new challenges in 2020 when ACCE is again at the same time (or immediately before) and in Dallas, TX, roughly a three-hour flight away from West.

Marketing and recruitment for next year will again continue to focus on the metro chamber opportunity, as well as continuing diversity efforts, while also working around the ACCE conflict. In addition, further attention will be given to highlighting the lifestyle that is present at West. While education is the foremost aspect of Institute, West offers unique experiences not present at the other sites.

Our board had a committee specifically tasked to work with Institute staff to leverage and maximize our use of social media during the year. This was positive, but we can always do more to promote the overall Institute experience and benefits, as well as West Institute specifically. As mentioned earlier, social media will also be used to highlight the West institute experiences that are unique to our site.

The challenges we experienced this year, and have experienced over the years, both with LMU and ACCE, pose some interesting discussion and upcoming decisions for the Institute Board of Trustees. We appreciate the initiative to proactively notify the board that there are some questions regarding the future of the West site. For the benefit of the students and the volunteers who are committed to West, I simply ask that said decision be made sooner than later. Should West not continue, we owe it to the students and to the loyal volunteers (who have steadily committed their time and funds to work with staff to recruit and raise funds for Institute) to give them as much time as possible to plan accordingly if West should not continue at LMU this coming year or in the years to come.

Specifically, students and their organizations should be given as much time as possible to plan for alternate sites, and early enrollment pricing for Winter should be granted for everyone at West up to the final registration deadline. I would also ask that any regents, chair, or vice chair that wishes to continue to serve and work for Institute be given an expedited opportunity to engage with other sites. I look forward to working with my fellow regents and the Board of Trustees to make these upcoming decisions and to then do what is best and right for those involved at West and the Institute program as a whole going forward - regardless of where those decisions lead.

Having started my Institute experience at LMU 13 years ago, it has been a genuine honor and pleasure to serve as chair during this year at West. We know we have challenges ahead of us, but we have a highly engaged and committed group of volunteers who will do what needs to be done going forward for the greater good. With incredible upcoming leadership provided by incoming chair Ryan Evans, IOM, executive director of the Chambers for Innovation and Clean Energy, and incoming vice chair Lisa Hermes, IOM, CCE, president of the McKinney Chamber, along with past leadership that has put so much in place, the West Board of Regents will work for what is best for West and Institute.

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



CONSENT AGENDA

NORTHEAST CHAIRMAN'S REPORT, FALL 2019

Final enrollment for 2019 Northeast Institute was 130 overall attendees with 40 first-years, and the goal was 146 overall with 46 first-years.

We believe our biggest successes to be re-invigorating the opening session and moving locations for Graduation and the Big Bash. Last year, we missed an opportunity to bring all the attendees together on the first day and we believe there was less cohesiveness. This year, we held an opening “pep rally” after Homeroom, which allowed us to set the stage for an energized week. This was followed by a reception at a nearby restaurant where attendees could continue to network. Graduation and the Big Bash were moved to the DoubleTree Hotel, which proved to be a roomier location with better sound. Thank you to the IOM staff for finding this new location. Additionally, the state photos were more organized this year will be tweaked even more next year.

Our biggest challenges are location and fundraising. The Villanova location is challenging on several levels. *Construction:* there is constant construction on campus, which forces attendees to negotiate around the work, hear the work during class time, walk further to the cafeteria, and deal with new hurdles each year. *Lodging:* (1) The Radnor Hotel is “ok” at best, but there isn’t another nearby hotel to use, although I will say that IOM staff did a nice job of searching for an additional hotel. (2) The dorms, well, are dorms. The attendees are split between the hotel and dorm, which impacts the networking and camaraderie. *Transportation:* Due to the split lodging, transportation is more complicated and more expensive. Fundraising was lower than hoped for this year, but similar to years past. We’ll need to do a better job of encouraging attendees to bring auction items in the future. The sale of “Institute Stars” through the Bidr platform was successful.

The Northeast Board of Regents will continue to build registration at this site by utilizing our professional and social networks. A focus on national association professionals will be key, as more than half the attendees come from the DMV area (DC proper, Maryland, and Virginia) in that market. Northeast area chambers will continue to be a target market due to the proximity and affordability of travel to the site. The board is also working on a program to utilize the Bidr platform to sell “Institute Stars” to past Northeast regents and Class Advisors as a way to keep them engaged and to help build the Northeast Regent Scholarship fund.

We haven’t utilized social media to the extent that we should in order to effectively recruit attendees. A plan is being developed for regents to be granted access to individual class Facebook groups each year to help facilitate dialog, share and post relevant information, and to remind attendees about registration deadlines, in addition to encouraging recruitment amongst coworkers and friends.

As noted above, the host location is challenging, and the Board of Regents would like to begin the process of exploring a new location for Northeast Institute. An ideal location would have all attendees’ lodging and classes on the same campus or conference center.

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



DEMOGRAPHICS

REGISTRATION PROJECTIONS AND GOALS

WINTER	2019 Final	2020 Projections
Class Section		
1-1	64	34
1-2	-----	34
1st year Total	64	68
2-1	33	51
2-2	29	-----
2nd year Total	62	51
3-1	28	28
3-2	25	27
3rd year Total	53	55
4-1	30	26
4-2	29	23
4th year Total	59	49
Winter Total	238	223
MIDWEST		
	2019 Final	2020 Projections
Class Section		
1-1	43	44
1st year Total	43	44
2-1	33	34
2nd year Total	33	34
3-1	38	30
3rd year Total	38	30
4-1	32	35
4th yr Total	32	35
MW Total	146	143

SOUTHEAST	2019 Final	2020 Projections
Class Section		
1-1	37	38
1-2	33	39
1st year Total	70	77
2-1	32	30
2-2	38	26
2nd year Total	70	56
3-1	23	29
3-2	30	34
3rd year Total	53	63
4-1	28	21
4-2	17	28
4th year Total	45	49
SE Total	238	245
WEST		
	2019 Final	2020 Projections
Class Section		
1-1	34	34
1st year Total	34	34
2-1	23	27
2nd year Total	23	27
3-1	20	21
3rd year Total	20	21
4-1	27	19
4th year Total	27	19
West Total	104	101

First-Year Assumptions*:

- Winter: 1.57%
- Midwest: -2.85%
- Southeast: 5.34%
- West: -3.55%
- Northeast: -4.22%

*First-year assumptions are based on overall trends from the past five years. To reach the 2020 projection, a stretch goal of 5% was added.

Retention Rates:

- Second-Year: 79.89%
- Third-Year: 89.42%
- Fourth-Year: 92.75%

2020 Projections:

- Overall: 842
- First-Years: 263

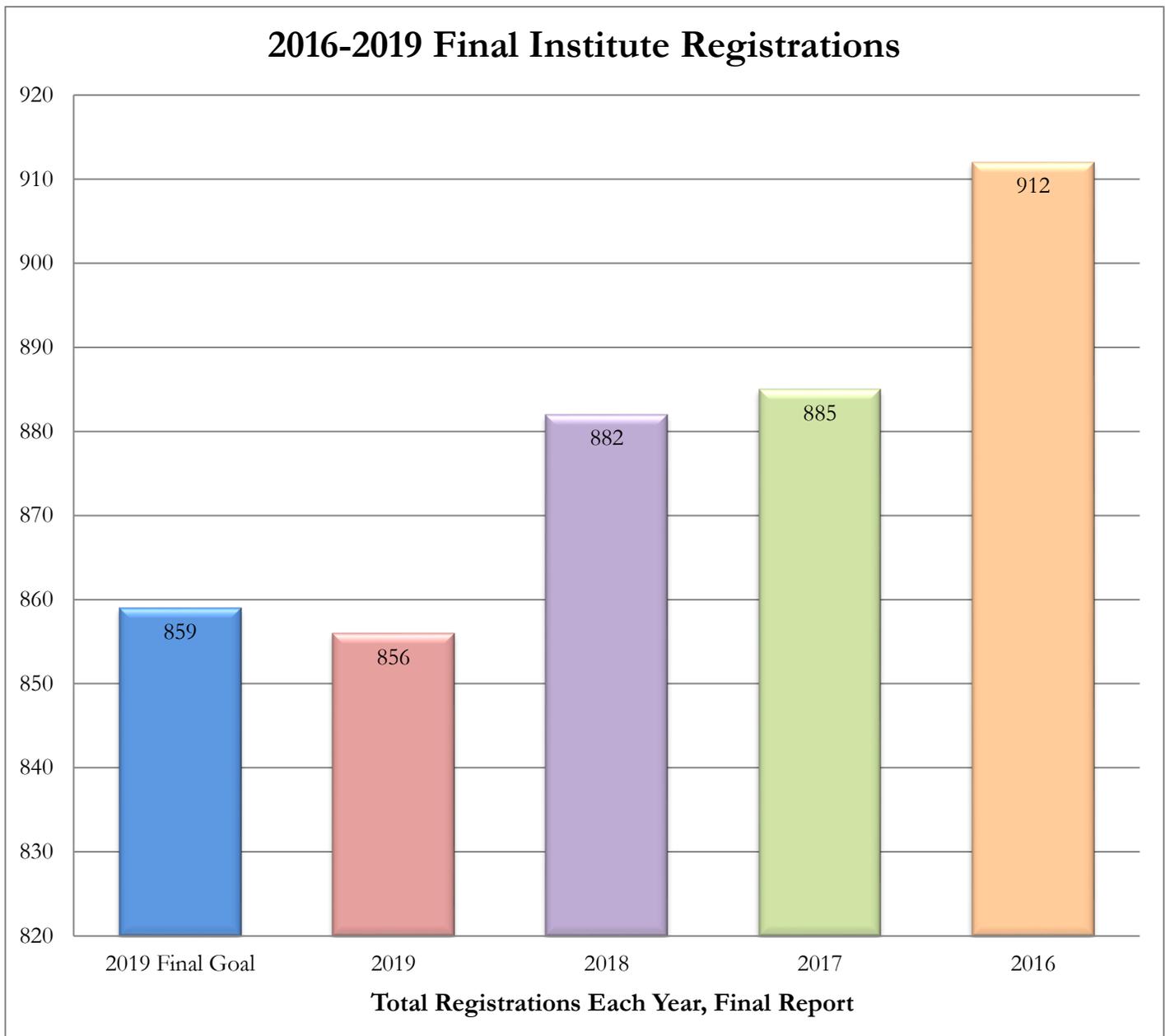
NORTHEAST	2019 Final	2020 Projections
Class Section		
1-1	21	40
1-2	19	-----
1st year Total	40	40
2-1	40	32
2nd year Total	40	32
3-1	24	36
3rd year Total	24	36
4-1	26	22
4th year Total	26	22
NE Total	130	130



DEMOGRAPHICS

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

REGISTRATION GRAPH





DEMOGRAPHICS

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

2019 DEMOGRAPHICS BY SITE

Class Level	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2019
1st year	29.45%	29.41%	32.69%	30.77%	26.89%
2nd year	22.60%	29.41%	22.12%	30.77%	26.05%
3rd year	26.03%	22.27%	19.23%	18.46%	21.37%
4th year	21.92%	18.91%	25.96%	20.00%	23.79%

Employer	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2019
Association	24.66%	8.82%	17.31%	43.85%	25.63%
Chamber	64.38%	88.24%	72.12%	44.62%	61.69%
Other	10.96%	2.94%	10.58%	11.54%	10.08%

Age	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2019
21 – 30	10.96%	18.07%	20.19%	16.92%	15.55%
31 – 40	40.41%	31.51%	24.04%	33.08%	29.83%
41 – 50	32.19%	31.09%	35.58%	25.38%	28.99%
51 +	16.44%	19.33%	20.19%	24.62%	25.63%

Ethnicity*	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2019
*Question not required (answers may not total 100%)					
Caucasian	86.30%	83.61%	67.31%	75.38%	81.51%
Other Ethnicity	6.16%	10.50%	19.23%	10.00%	13.03%

Years of Experience in Association/Chamber Field	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2019
Less than 2 years	6.85%	9.66%	9.62%	9.23%	8.82%
2 to 5 years	31.51%	34.87%	35.58%	26.15%	34.45%
6 to 10 years	25.34%	28.15%	21.15%	18.46%	24.37%
More than 10 years	36.30%	27.31%	33.65%	46.15%	32.35%

How Did You Learn About Institute?*	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2019
*Multiple Responses Possible					
Employer	47.26%	64.29%	63.46%	48.46%	55.46%
Colleague	38.36%	19.75%	24.04%	37.69%	33.19%
State Conference	6.85%	7.98%	1.92%	4.62%	5.46%
Direct Mail	0.00%	0.00%	0.00%	0.00%	0.00%
Email	1.37%	2.52%	3.85%	3.85%	1.68%
Website	0.00%	0.00%	0.00%	0.00%	0.00%
Other	6.16%	5.46%	6.73%	5.38%	4.20%



DEMOGRAPHICS

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

2019 DEMOGRAPHICS BY SITE

Organization's Budget Size <i>(excluding Public Funds)</i>	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2019
Less than \$100,000	3.42%	4.20%	1.92%	0.77%	3.36%
\$100,001 - \$250,000	12.33%	14.71%	5.77%	6.15%	14.29%
\$250,001 - \$500,000	22.60%	21.85%	16.35%	10.77%	19.33%
\$500,001 - \$1,000,000	16.44%	21.85%	14.42%	20.77%	14.71%
\$1,000,001 - \$3,000,000	16.44%	18.07%	30.77%	23.08%	18.91%
\$3,000,001 - \$5,000,000	6.85%	7.56%	6.73%	12.31%	7.98%
\$5,000,001 - \$10,000,000	9.59%	7.14%	10.58%	9.23%	10.50%
Greater than \$10,000,001	12.33%	4.62%	13.46%	16.92%	10.92%

Organization's Staff Size	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2019
Less than 3	19.86%	18.91%	11.54%	8.46%	13.87%
3 to 10	43.84%	52.10%	47.12%	44.62%	49.16%
11 to 25	11.64%	13.45%	16.35%	20.77%	15.13%
26 to 50	9.59%	11.76%	13.46%	7.69%	10.50%
51 to 100	8.22%	1.68%	5.77%	9.23%	3.78%
More than 100	6.85%	2.10%	5.77%	9.23%	7.56%

Level of Responsibility	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2019
CEO / Executive Director	36.30%	34.03%	25.96%	21.54%	34.87%
Senior Executive / Department Director	34.93%	35.29%	42.31%	43.08%	38.24%
Manager	19.86%	17.65%	19.23%	25.38%	15.55%
Coordinator / Assistant/ Other	8.90%	13.03%	12.50%	10.00%	11.34%

Primary Job Responsibility	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2019
Membership	17.12%	20.59%	16.35%	16.15%	15.13%
General Management	47.26%	39.92%	34.62%	34.62%	42.44%
Marketing	13.70%	11.76%	34.62%	11.54%	11.34%
Finance	1.37%	4.62%	7.69%	5.38%	2.94%
Government Relations	4.11%	4.20%	7.69%	10.77%	8.40%
Other	16.44%	18.91%	22.12%	21.54%	19.75%



YEAR IN REVIEW

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

MARKETING UPDATE

In 2019, Institute's marketing efforts were advanced through the hard work and collaboration of the volunteers and the Institute staff. Below is an overview of our marketing accomplishments and endeavors for your review. Our main goal was to create new forms of marketing the return on investment attendees would receive from Institute and how this would translate to their communities and organizations.

Advertisements:

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

Promotional Materials:

- Institute sent blue tablecloths with our logo and hashtag to different conferences. They were also utilized by staff at larger conferences such as W.A.C.E., MAKO and M.A.C.E. These bright, eye-catching pieces are easy to transport and also market our social media presence.
- The water bottles given to attendees with their planner during registration were well received. They're used during the Institute week and in continuity afterwards, assisting in marketing of the program.
- Institute screen cleaners, featuring testimonials from Institute board members and alumni, have been included in the 15+ conference shipments so far this year. They are a unique item and printing them in full-color makes them an attractive collateral piece easy to take home from an event.
- Attendees receive an Institute branded metal alloy pen and silicon card holder on-site. The pen writes very well and is used by attendees post-site. It is also included in state conference shipments.



YEAR IN REVIEW

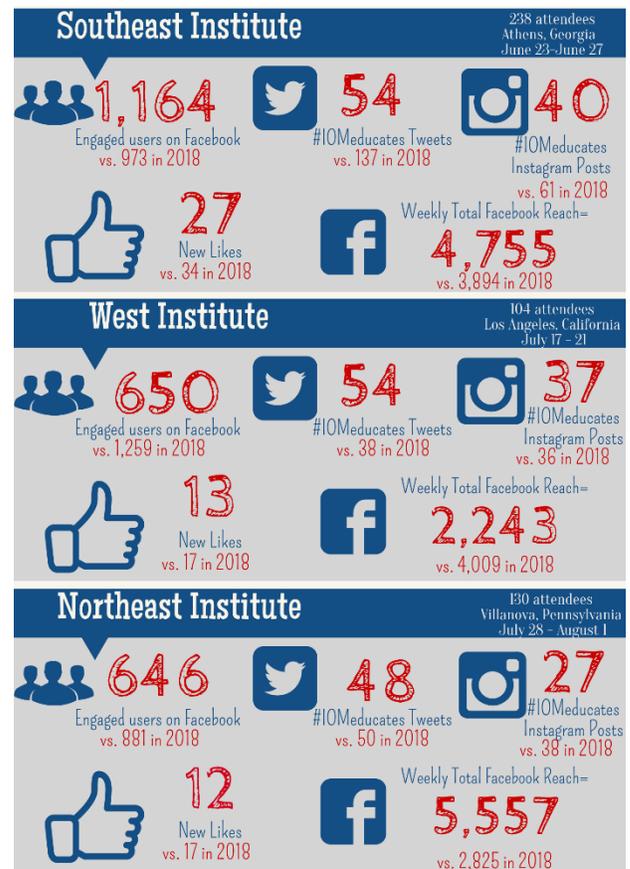
U.S. CHAMBER OF COMMERCE FOUNDATION
Institute for Organization Management

SOCIAL MEDIA UPDATE

	2018*	2019*	Percentage Increase
Facebook	2,988 Likes	3,278 Likes	9.7%
Twitter	1,851 Followers	1,930 Followers	4.3%
LinkedIn**	-	264	-
Instagram	480 Followers	568 Followers	18.3%

*Numbers as of September 15

**The LinkedIn group was discontinued and a new showcase page under the U.S. Chamber was created.



Highlights:

- Posted #ROInstitute every Friday highlighting personal and organizational return on investment testimonials.
- Posted #TuesdayTestimonial every week.
- Posted on the IOM blog each week and promoted on Twitter and Facebook.
- Posted #FacultyFeature once per month highlighting an Institute faculty member that teaches on-site.
- Encouraged social media promotion from board members through the creation of content calendars distributed to the Board of Trustees and each Board of Regents.



YEAR IN REVIEW

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

SCHOLARSHIP AND FUNDRAISING UPDATE

- Starting with Summer Institute sites, Institute introduced the “INVESTED” ribbon to fundraise for National Scholarships and State Partnership Scholarships. For 2020, we raised over \$3K.
 - Institute awarded \$15K in State Partnership Scholarships and \$12.5K were redeemed.
 - Institute awarded \$2.5K in National Scholarships and \$2K were redeemed.
- 230 people applied for Institute Regent Scholarships, and of the 147 who were awarded funds, 132 attended the program.

Fundraising

2019	Winter	Midwest	Southeast	West	Northeast	Total
Total to allocate to 2019 sites:	\$10,854.67	\$6,890.00	\$8,021.26	\$11,746.84	\$6,318.00	\$43,830.77

2020	Winter	Midwest	Southeast	West	Northeast	Total
Funds Remaining From Previous Year's Scholarship Allocation	\$497.67	\$ 640.00	\$1,271.26	\$ 2,997.84	\$1,368.00	\$6,774.77
Silent Auction and Onsite Fundraising	\$16,940.57	\$4,428.32	\$6,956.03	\$ 7,874.02	\$3,083.02	\$39,281.96
#GivingTuesday	\$510.00	\$1,455.00	\$ 225.00	\$ 540.00	\$ -	\$2,730.00
\$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 2020 Sites:	\$18,948.24	\$7,523.32	\$9,452.29	\$12,411.86	\$5,451.02	\$53,786.73

2019	Winter	Midwest	Southeast	West	Northeast	Total
Redeemed State Partnership Scholarships	\$1,000.00	\$2,500.00	\$6,500.00	\$ 500.00	\$2,000.00	\$12,500.00
Redeemed National Scholarships	\$ 500.00	\$ -	\$ 500.00	\$ 500.00	\$ 500.00	\$ 2,000.00
Total Institute Redeemed Scholarships	\$1,500.00	\$2,500.00	\$7,000.00	\$ 1,000.00	\$2,500.00	\$14,500.00

2020	Winter	Midwest	Southeast	West	Northeast	Total
INVESTED	\$ -	\$ 1,197.86	\$ 794.75	\$ 467.50	\$ 888.25	\$ 3,348.36

Scholarships

2019	Winter	Midwest	Southeast	West	Northeast	Total
Scholarship Applicants	69	40	62	32	27	230
Scholarships Awarded	57	23	31	19	17	147
Scholarships Redeemed	55	21	26	16	14	132

2019 Incentive Programs	Winter	Midwest	Southeast	West	Northeast	Total
Premier Investor Discount	13	14	25	11	9	72
Group Discount	17	15	33	10	13	88
W.A.C.E.	6	0	1	5	0	12



YEAR IN REVIEW

FACULTY UPDATE

Please note: Course evaluations are based on a five-point scale. The lowest score for each class was dropped starting in 2018.

2019 FACULTY

Contracted with a total of 67 faculty members, of those 18 were new faculty members (27%).

- Course Evaluation Average: 4.61 (67)
 - Staff 4.70 (6)
 - Expert 4.66 (4)
 - Consultant 4.62 (31)
 - Practitioner 4.56 (26)

2018 FACULTY

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

- Course Evaluation Average: 4.42 (65)
 - Staff 4.44 (6)
 - Consultant 4.43 (35)
 - Practitioner 4.43 (20)
 - Expert 4.27 (4)

2017 FACULTY

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

- Course Evaluation Average: 4.51 (66)
 - Expert 4.60 (2)
 - Consultant 4.56 (32)
 - Staff 4.56 (6)
 - Practitioner 4.46 (25)
 - Professor 3.93 (1)

2016 FACULTY

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

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



YEAR IN REVIEW

FACULTY UPDATE

Institute sponsored faculty at the following conferences:

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

Keynote Speaker: Shari Pash

February 6-8, 2019

Anaheim, CA

Number of attendees: 400

MAKO

Keynote Speaker: Steve Swafford

April 14-16, 2019

Branson, MO

Number of attendees: 300

MACE (Mid-America Chamber Executives)

Keynote Speaker: Tracey Jones

May 1, 2019

Sioux Falls, SD

Number of attendees: 120



YEAR IN REVIEW

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

VOLUNTEER UPDATE

Congratulations to all Board of Trustees, Boards of Regents, and Curriculum Committee members on a truly successful year! A special thank you to the Board of Trustees Chair, Megan Lucas, IOM, CCE, CEcD for her leadership and on-site engagement, as well as all volunteers for their continuous efforts to market the program this Institute season. Due to your hard work, the final enrollment for 2019 Institute was 856 overall attendees, 251 of which were first-years. As a point of reference, final enrollment was 882 overall and 253 first-years in 2018.

We are looking forward to a great year ahead!

Below are some highlights from 2019.

- Recruited 8 new Board of Regent members and 30 Class Advisors from various associations and chambers of commerce across the country.
- Of the 30 Class Advisors, 26 were first-time advisors.
- 206 interested volunteers in our database representing 36 states plus D.C.
- 34 states plus D.C. are currently represented on the boards and committee.
- 24 first-years were recruited from board members' organizations.
- 50 returning students were recruited from board members' organizations, compared to 43 in 2018.

BOARD MEMBER RECRUITMENT GRID

On the following pages, you will find a copy of the 2019 Board Member Recruitment Grid, which helped to monitor Institute's outreach and recruitment. Please know this document represents a very small fraction of what you do every day to market the Institute program. We know that volunteer recruitment and action is the key to our success, and we thank you for all you do.

2019 Institute Volunteer Recruitment Grid

First Name	Last Name	Organization	Location	First-Years Recruited from Same Organization	Returning Students from Same Organization	First-Years Recruited from Other Organization
Juliet	Abdel	Westminster Chamber of Commerce	West			
Jerry	Alford	Greater Palm Harbor Chamber of Commerce	Southeast			
Lowell	Aplebaum	Vista Cova, LLC	CC			
Jenna	Armstrong	Lake Houston Area Chamber of Commerce	Midwest		Christina O'Dell (3-Southeast)	
Jeremy	Arthur	Chamber of Commerce Association of Alabama	CC, BOT			Suzy Jouben (1-Southeast); Kristin Barton (1-Southeast)
Steve	Baas	Metropolitan Milwaukee Association of Commerce	Winter		Andrew Davis (3-Winter)	
Jason	Ball	Sioux Falls Area Chamber of Commerce	Midwest		Amy Farr (3-Midwest)	
Kara	Beer	Battle Creek Area Chamber of Commerce	Winter	Steven Elkins (1-Winter); Alaina Campbell (1-Winter)		
Desiree	Bennyhoff	Edwardsville/Glen Carbon Chamber of Commerce	CC, Midwest		Katie Haas (2-Midwest)	
Christin	Berry	ASAE: The Center for Association Leadership	CC, BOT	Myisha Headen (1-Winter); Ashley Roberts (1-Southeast)	Sherelle Faulkner (3-Winter); Clarence Ford (3-Winter); Derek Saunders (2-Winter)	
Rita	Berry	Greater Summerville/Dorchester County Chamber of Commerce	Southeast		Jena Ferguson (2-Winter); Jena Ferguson (3-Southeast)	
Marvin	Bond	Greater Irving-Las Colinas Chamber of Commerce	Northeast		Kitty Garces (2-Winter); Dagmar Metzler (3-Winter)	
Jason	Camis	Gardner Edgerton Chamber of Commerce	West			
Rich	Canillon	Ponca City Area Chamber of Commerce	BOT			
Erin	Carney	Metrocrest Chamber of Commerce	Winter			
Karri	Clark	Bozeman Area Chamber of Commerce	Winter			
Steve	Clark	Fayetteville Chamber of Commerce	BOT, Northeast			
Kate	Conroy	New Jersey Business & Industry Association	Northeast			
Kim	Dahlsten	Catawba County Chamber of Commerce	BOT	Myea Jones (1-Southeast)	Connie Saunders (2-Southeast)	
Bryan	Daniels	Blount Partnership	Southeast		Jessica Belitz (2-Southeast); Kim Mitchell (3-Southeast)	
Liz	Deville	SWLA Economic Development Alliance	Southeast		Amanda White (4-Southeast)	
Josh	Driskell	Jenks Chamber of Commerce	Winter	Angie Rains (1-Winter)		
Cat	Dority	Charleston Area Convention and Visitors Bureau	CC	Jill Maynard (1-Winter)	Kara Ahl (4-Northeast)	
Ryan	Evans	Chambers for Innovation and Clean Energy	CC, West			
Tony	Felker	Frisco Chamber of Commerce	CC, BOT			
Mark	Field	Knoxville Chamber of Commerce	BOT		Lauren Longmire (3-Southeast)	
Bill	Fleming	Pekin Area Chamber of Commerce	Midwest	Manda Brown (1-Midwest)		
Rudy	Flores	Lincoln Square Ravenswood Chamber of Commerce	Winter		Katherine Kraus (4-Midwest)	
Henry	Florsheim	Wichita Falls Chamber of Commerce	Southeast	Rebecca Churchwell (1-Southeast)	Christina Bell (2-Southeast); Jinna Barrett (2-Southeast)	
Mike	Greene	Council for Responsible Nutrition	West	Brian Wommack (1-Northeast)		
Jeff	Griffin	Peoria Area Chamber of Commerce & The CEO Council	CC, Midwest	Audrey Kamm (1-Midwest)		
Brenda	Gudex	American Milking Shorthorn Society	Winter			
Heidi	Gullickson	Brookings Area United Way	Midwest			
Amy	Hager	Virginia Chamber of Commerce	Northeast			
Tracey	Halliday	American Beverage Association	Midwest			
Steve	Halter	Greater Poplar Bluff Area Chamber of Commerce	Winter			
Lisa	Hermes	McKinney Chamber of Commerce	West		Kathy Blank (3-West); Linda Imai-Dixon (3-West); Robin Vestal (4-West)	
Liz	Horton	Greenville Chamber of Commerce	Southeast			
Rick	Howe	Jackson Hole Chamber of Commerce	Winter		Anna Olson (2-Winter); Elisabeth Rohrbach (2-Winter); Riley Boone (2-West)	
Lisa	Hoyt	Petoskey Regional Chamber of Commerce	Midwest	Nikki Devitt (1-Winter)		
Corey	Hutcherson	Wake Forest Area Chamber of Commerce	Midwest			
Pammic	Jimmar	Chamber of Commerce of Huntsville/Madison County	Southeast	Devon Elston (1-Southeast); Austin Bullock (1-Northeast)	Kristy Drake (2-Southeast); Mary McNairy (3-Southeast); Claire Aiello (2-Southeast)	
Dawn	Johnson	Muskegon Lakeshore Chamber of Commerce	Midwest		Carla Flanders (2-Winter)	
DJ	Johnson	Association of Women's Health, Obstetric & Neonatal Nurses (AWHONN)	BOT			
Jim	Johnson	Georgetown Chamber of Commerce	West	Dana Sanders (1-West)	Allison McKee (4-Southeast)	
Mike	Johnson	National Stone, Sand, and Gravel Association	Winter			

2019 Institute Volunteer Recruitment Grid

Christine	Kennedy	Lynchburg Regional Business Alliance	BOI, Southeast			
Nick	Kieffer	Goshen Chamber of Commerce	Winter			
Michelle	Kieley	Knoxville Chamber of Commerce	Southeast		Lauren Longmire (3-Southeast)	
Cheryl	Kuhn	Southern Chester County Chamber of Commerce	Northeast			
Brad	Lacy	Conway Area Chamber of Commerce	West		Laura Davis (4-West); Ed Linck (4-West); Leo Cummings (2-West)	
Jack	Lank	The United Regional Chamber of Commerce	BOI			
Bill	Lee	Gallup-McKinley County Chamber of Commerce	Winter	Cecilia Perez (1-Winter)		
Dan	Lemyre	Association Headquarters, Inc.	Northeast			
Jackie	Lovejoy	Dearborn Area Chamber of Commerce	Northeast			
Megan	Lucas	Lynchburg Regional Business Alliance	BOI			
Kelle	Marsalis	Plano Chamber	BOI, CC, West		Meghan Kelley Wehner (2-Winter)	Erin Aylor (1-West); Justin Lee (2-West)
Matt	McCormick	Columbia Chamber of Commerce	BOI, CC		Jolyn Satzizahn (3-Winter)	
Tim	McKee	Olathe Chamber of Commerce	CC		Kelly Peetoom (3-Midwest)	
Pete	McNamara	New Hampshire Automobile Dealers Association	BOI, Northeast	Shawna Tinkham (1-Northeast)	Jessica Dade (2-Northeast)	
Robert	Medler	Tucson Metro Chamber	BOI, Winter			
Patty	Montgomery	American Society of Civil Engineers	Northeast		Leslie Payne (4-Northeast)	
Crystal	Moore	Association of Chamber of Commerce Executives	CC, BOI			
Beth	Morrison	Greater Dalton Chamber of Commerce	Southeast		Robert Bradham (4-Southeast)	
Mulder	Mulder	Greater Irving-Las Colinas Chamber of Commerce	West			
Peter	Murphy	Illinois Association of Park Districts	Midwest			
Matt	Myers	North Central Massachusetts Chamber of Commerce	Northeast			
Robert	Newman	Independent Film and Television Alliance	West			
Douglas	O'Flaherty	South Carolina Restaurant and Lodging Association	CC, Northeast		Katie Montgomery (2-Northeast)	
Lynn	Olberding	Marshalltown Area Chamber of Commerce	Winter			
Erica	Pangburn	Denton Chamber of Commerce	Winter			Laurin Kocurek (1-Winter)
Stephanie	Parton	Indiana CPA Society	BOI	Sarah Townsend (1-Winter)	Sherill Rude (3-Winter)	
Jodie	Perry	Richland Area Chamber of Commerce	CC, BOI, Midwest		Nicole Lewis (3-Midwest)	
Heidi	Peterson	Wyoming State Chamber of Commerce	West			Erin Helms (1-West)
Jackie	Rakers	Illinois Association of Mutual Insurance Companies	CC			Patrick Laws (2-Midwest)
Jennifer	Reiser	Billings Area Chamber of Commerce	West	Alyssa Voeltz (1-Winter)	Alyssa Voeltz (1-West)	
Kuma	Roberts	Tulsa Regional Chamber	West	Courtney Dresher (1-West)		
Rick	Roden	Greater Jackson County Chamber of Commerce	Southeast			
Teri	Smiley	Walton County Chamber of Commerce	CC, Southeast	Michelle Lee (1-Southeast)		
Mike	Smith	Solar Energy Industries Association	Northeast			
Katie	Stice	Rancho Mirage Chamber of Commerce	West			
Carrie	Stuart	Gettysburg Adams Chamber of Commerce	Northeast			
Steve	Swafford	Leadership Outfitters, LLC	CC			
Heath	Taylor	Dublin-Laurens Chamber of Commerce	Southeast			
Gene	Terry	Association Headquarters, Inc.	BOI, West			
Carlton	Tidwell	Terrell Chamber of Commerce	Southeast		Angie Cooper (2-Southeast)	
Raymond	Towle	U.S. Chamber of Commerce	BOI			
Robert	Uhler	City of Fort Scott	Northeast			
Ray	Villegas	Mount Dora Area Chamber of Commerce	Southeast			
Allison	Walden	Tulsa Regional Chamber	CC, Southeast	Courtney Dresher (1-West); Brenda Lewis (1-Northeast)		
Chris	Wallace	North Texas Commission	BOI			
Scott	Waller	Mississippi Economic Council	BOI, Southeast		Rosie Thomas (3-Southeast); Danielle Williams (3-Southeast); Jason Word (4-Southeast); Beth Kitchings (2-Southeast)	
Lisa	Weitzel	Illinois Association of Chamber of Commerce Executives	Midwest			Michelle Kim (1-Winter); Alicia Bernes (1-Midwest); Yvonne Invergo (1-Midwest); Courtney Eeten (1-Midwest)
Angie	Whitcomb	Shakopee Chamber of Commerce	BOI, Midwest	Tim Zunker (1-Midwest)		Christina Anders (1-Midwest)
Nika	White	Nike White Consulting, LLC	CC			
Morri	Yancy	Lake Gunterville Chamber of Commerce	CC			
Heidi	Zich	Home Builders Association of the Fox Cities	Midwest			



2019 ATTENDEES

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

ATTENDEE STATE BREAKDOWN

856 Attendees from 49 states, the District of Columbia, and Lagos

State, Number of Attendees, %

Alabama,	27,	3.15%	Missouri,	23,	2.69%
Alaska,	9,	1.05%	Montana,	6,	0.70%
Arizona,	12,	1.40%	Nebraska,	8,	0.93%
Arkansas,	22,	2.57%	Nevada,	1,	0.12%
California,	31,	3.62%	New Hampshire,	4,	0.47%
Colorado,	9,	1.05%	New Jersey,	4,	0.47%
Delaware,	1,	0.12%	New Mexico,	6,	0.70%
District of Columbia,	57,	6.66%	New York,	4,	0.47%
Florida,	36,	4.21%	North Carolina,	32,	3.74%
Georgia,	37,	4.32%	North Dakota,	1,	0.12%
Hawaii,	1,	0.12%	Ohio,	16,	1.87%
Idaho,	6,	0.70%	Oklahoma,	21,	2.45%
Illinois,	45,	5.26%	Oregon,	6,	0.70%
Indiana,	16,	1.87%	Pennsylvania,	12,	1.40%
Iowa,	17,	1.99%	Rhode Island,	1,	0.12%
Kansas,	23,	2.69%	South Carolina,	32,	3.74%
Kentucky,	17,	1.99%	South Dakota,	8,	0.93%
Lagos,	1,	0.12%	Tennessee,	27,	3.15%
Louisiana,	15,	1.75%	Texas,	77,	9.00%
Maine,	6,	0.70%	Utah,	5,	0.58%
Maryland,	16,	1.87%	Vermont,	2,	0.23%
Massachusetts,	6,	0.70%	Virginia,	48,	5.61%
Michigan,	27,	3.15%	Washington,	4,	0.47%
Minnesota,	18,	2.10%	West Virginia,	3,	0.35%
Mississippi,	23,	2.69%	Wisconsin,	15,	1.75%
			Wyoming,	12,	1.40%

State not represented:

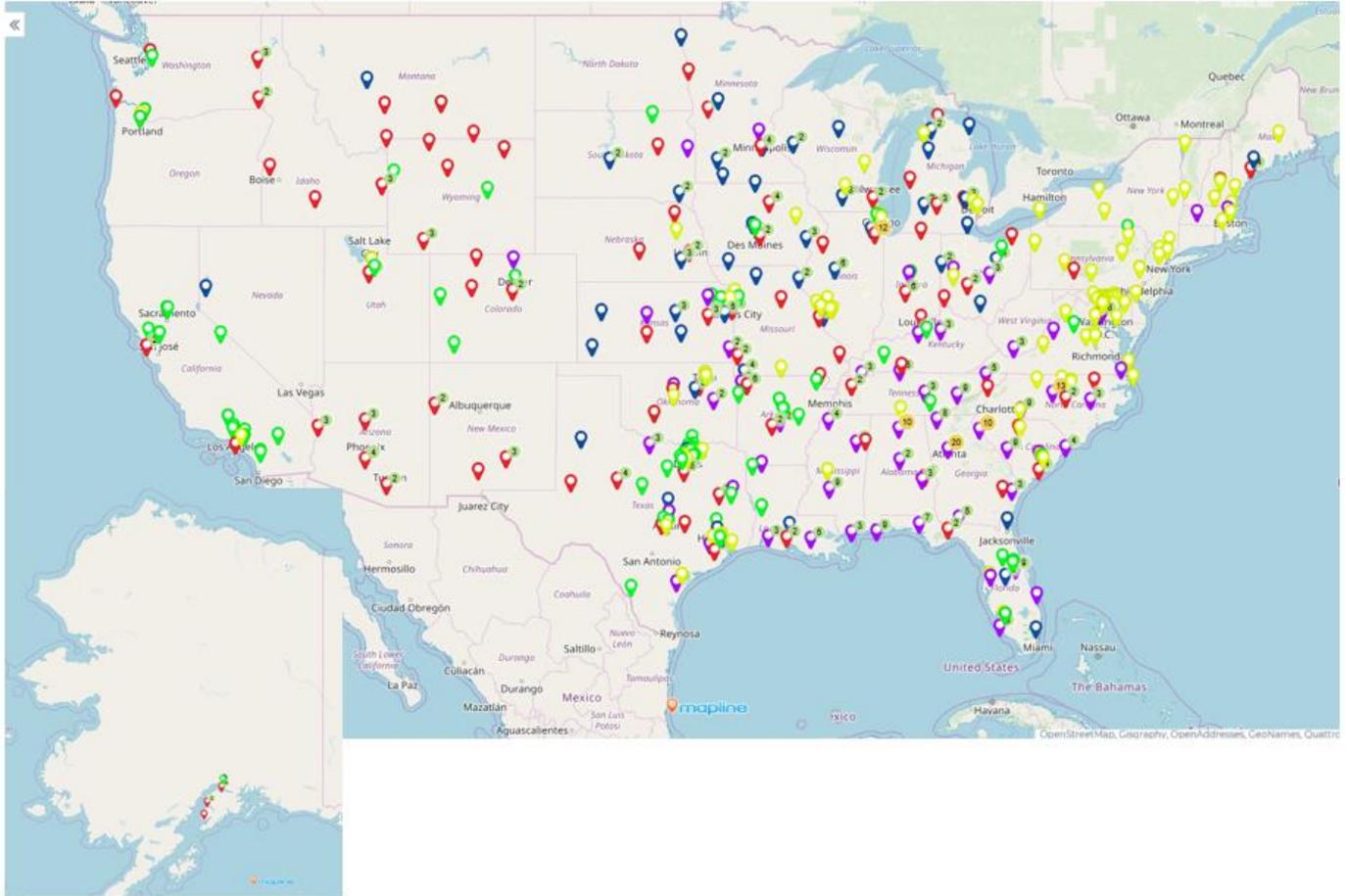
- Connecticut



2019 ATTENDEES

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

ATTENDEE STATE BREAKDOWN



-  Midwest Data
-  Northeast Data
-  Southeast Data
-  West Data
-  Winter Data



WINTER

2020 BOARD OF REGENTS

CHAIR

Robert Medler, IOM
Vice President
Tucson Metro Chamber
PO Box 991
Tucson, AZ 85701
520-792-2250
rmedler@tucsonchamber.org
Term: 2019-2020

PAST CHAIR

Nick Kieffer, IOM, CP
President and CEO
Goshen Chamber of Commerce
232 South Main Street
Goshen, IN 46526
574-533-2102
nkieffer@goshen.org
Term: 2019-2020

Kara Beer, IOM

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

Josh Driskell, IOM

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

VICE CHAIR

Erin Carney, IOM
President
Metrocrest Chamber of Commerce
2550 Midway Road #240
Carrollton, TX 75006
469-587-0420
erin@metrocrestchamber.com
Term: 2019-2020

Steven Baas, IOM, CCE

Senior Vice President, Government Affairs and
Public Policy
Metropolitan Milwaukee Association of
Commerce
756 North Milwaukee Street, Suite 400
Milwaukee, WI 53202
414-287-4138
sbaas@mmac.org
Term: 2015-2021

Karri Clark, IOM

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

Rodolfo Flores, IOM

Executive Director
Lincoln Square Ravenswood Chamber of
Commerce
2611 West Lawrence Avenue
Chicago, IL 60625
773-728-3890
rudy@lincolnsquare.org
Term: 2017-2021



WINTER

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

2020 BOARD OF REGENTS

Brenda Gudex, IOM

Executive Secretary
American Milking Shorthorn Society
PO Box 42
Oakfield, WI 53065
920-292-4282
brendagudex@yahoo.com
Term: 2017-2021

Rick Howe, IOM

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

William Lee, IOM

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

Erica Pangburn, IOM

President
Denton Chamber of Commerce
414 West Parkway Street
Denton, TX 76201
940-382-9693
erica@denton-chamber.org
Term: 2018-2020

Steve Halter, IOM, EDFP, PCED

President
Greater Poplar Bluff Area Chamber of
Commerce
1111 West Pine Street
Poplar Bluff, MO 63901
573-785-7761
shalter@poplarbluffchamber.org
Term: 2015-2021

Michael Johnson, IOM

President and CEO
National Stone, Sand, and Gravel Association
66 Canal Center Plaza, Suite 300
Alexandria, VA 22314
703-525-8788
mjohnson@nssga.org
Term: 2018-2020

Lynn Olberding, IOM, CCE

Executive Director
Marshalltown Area Chamber of Commerce
PO Box 1000
Marshalltown, IA 50158
641-753-6645
lolberding@marshalltown.org
Term: 2017-2021



AGENDA

OCTOBER 4, 2019

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

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

- I. **Welcome and Introductions** Robert Medler, IOM
- II. **Approval of Minutes** Robert Medler, IOM
- III. **Institute Staff Update** Institute Staff
A. Program Updates and Looking Ahead
- IV. **2020 Winter Institute** Board Members/Institute Staff
A. Review of Strategic Goals
- Raise \$12,500 through fundraising efforts.
 - Market and promote the program to meet the enrollment goals set by staff based on previous trends and history (223 overall, 68 first-years).
 - Focus on and continue to improve upon the on-site first-year experience, specifically the first impression.
- B. Class Advisor/Regent Partner Discussion Erin Carney, IOM
- C. Discussion of the Week/Regent Responsibilities
- **Scholarships** – Bill Lee, Brenda Gudex, Rick Howe, Kara Beer, Lynn Olberding
 - **First-Year Welcome** – Rudy Flores, Erica Pangburn
 - **Pre-Networking/Social Event** – Rudy Flores, Erica Pangburn
 - **Fundraising** –Josh Driskell, Erin Carney, Rick Howe
 - **Industry Consultations** – Kara Beer, Rick Howe, Lynn Olberding, Steve Baas
 - **Association Event** –Mike Johnson, Nick Kieffer
 - **5k** – Steve Halter
 - **Institute's Got Talent** – Erin Carney
 - **State Photos** – Lynn Olberding
 - **Graduation/Big Bash** – Erica Pangburn, Lynn Olberding, Karri Clark
 - **Volunteer/Faculty/Staff Dinner** –
 - **Social Media Strategy (Optional)** –
- V. **Other Business/Adjournment** Robert Medler, IOM

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

MINUTES AUGUST 20, 2019 12:00 P.M. EDT CONFERENCE CALL

In attendance: Robert Medler, IOM; Erin Carney, IOM; Nick Kieffer, IOM, CP; Kara Beer, IOM; Karri Clark, IOM; Josh Driskell, IOM; Rudy Flores, IOM; Rick Howe, IOM; Michael W. Johnson, IOM; Lynn Olberding, IOM, CCE; Erica Pangburn, IOM; Karyn K. MacRae, IOM, CAE, CMP; Andrew Weller, IOM; Mandy Pan

I. Welcome and Introductions

Robert Medler, IOM welcomed everyone to the call and roll was taken.

II. Approval of Minutes

Minutes from the May 30, 2019 conference call were unanimously approved with no changes.

III. Review of Strategic Goals

The strategic goals were reviewed and the 2020 goals were shared.

- Overall Goal: 223
- First-Years: 68
- Second-Years: 51
- Third-Years: 55
- Fourth-Years: 49

Staff reported that the goals are based on real numbers and trends from the past five years, with 5% added to the first-year assumptions. It was also noted that the bi-weekly recruitment update will start back up again after the Fall Board Meeting.

IV. 2020 Winter Institute

- Recruitment and marketing ideas
 - Various regents shared information regarding past and upcoming state conferences.
- Logistical updates
 - Staff shared that the contract for the Student Union has been fully executed and that room assignments and various details have already been confirmed. Regents also learned that the Marriott is currently on track with construction and hope to have everything completed this fall. It was confirmed that registration will remain at the Marriott, and that meals will go back to the traditional format with provided lunches and breakfast on your own.



MINUTES AUGUST 20, 2019 12:00 P.M. EDT CONFERENCE CALL

- Updates from Regent Task Groups
Regent responsibilities were reviewed, and updates were provided where appropriate.
 - Class Advisors – The call to action email will be sent this week, and anyone with suggestions was encouraged to send them to Erin. It was noted that the goal is to bring in some new blood.
 - Fundraising – Brief conversations have taken place, and the committee plans to meet via conference call in the coming weeks. The plan is to start soliciting for items this fall.
 - Industry Consultations – The committee intends to increase pre-site promotion and communications.
 - Scholarships – The committee will hear more information from staff in the coming weeks regarding changes to the scholarship process.
 - Association Event – This will be a similar event to years past, and will once again take place at Illegal Pete's.
 - Institute's Got Talent – Fourth-year Jeremy Harris will continue to serve as the lead for this event, which will be held at the Frog & Firkin. He will pass the torch to someone else for next year.
 - First-Year Welcome – This refers to the optional post-Kickoff event, which last year took place at Gentle Ben's, where a scholarship kickback was received. While it doesn't have to focus solely on first-years, the thought is that this group is the most likely to be on their own the first night. Robert requested that regents come prepared in October to share thoughts on how to make Sunday night (and Saturday) beneficial for all attendees, especially first-years.
 - Pre-Networking/Social Event – The committee is working closely with the Tucson CVB on ideas and ways for groups to explore the city. Whatever is planned will take place on Saturday, and the committee will reach out to first-years for promotion as we get closer to January.



MINUTES
AUGUST 20, 2019
12:00 P.M. EDT
CONFERENCE CALL

V. Staff Update(s)

Staff shared that registration will launch in either late August or early September. A reminder was shared that all discount codes, including scholarships, must be entered at the time of registration and that anyone applying for an Institute scholarship should NOT register until after they have received their results.

Regents were reminded to RSVP for the Fall Board Meeting, and it was noted that a reminder will be sent out shortly.

IV. Other Business/Adjournment

A brief discussion took place surrounding the post-board dinner optional pedal bike activity, and the group decided not to move forward.

There being no other business, the call was adjourned.

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



WINTER

2020 SCHEDULE OF ACTIVITIES

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

Sunday, January 5

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

Board of Regents and Class Advisor Briefing: Tucson Marriott University Park
Registration: Tucson Marriott University Park, Lobby Level
Graduation Rehearsal (4th years only): Student Union Memorial Center
Homeroom: Student Union Memorial Center, Individual Rooms
Institute Kickoff: Student Union Memorial Center, Gallagher Theater

Monday, January 6

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

Registration: Student Union Memorial Center, Staff Office, Santa Cruz
Core Classes: Student Union Memorial Center, Individual Rooms (*Break: 9:30–10:00 a.m.*)
Lunch: Student Union Memorial Center, Grand Ballroom
Core Classes: Student Union Memorial Center, Individual Rooms (*Break: 2:00–2:30 p.m.*)
Class Advisor Meeting: Student Union Memorial Center, Regent Office, San Pedro
Elective Classes: Student Union Memorial Center, Individual Rooms
Class Dinners: On Your Own

Tuesday, January 7

8:00 a.m.–10:00 a.m.
10:00 a.m.–10:30 a.m.
10:30 a.m.–12:30 p.m.
11:00 a.m.–11:30 a.m.
12:30 p.m.–1:30 p.m.
1:30 p.m.–5:00 p.m.
2:00 p.m.–2:30 p.m.
5:20 p.m.
6:30 p.m.

Elective Classes: Student Union Memorial Center, Individual Rooms
Break: Student Union Memorial Center, Grand Ballroom
Elective Classes: Student Union Memorial Center, Individual Rooms
Board of Regents Meeting: Student Union Memorial Center, Regent Office, San Pedro
Lunch: Student Union Memorial Center, Grand Ballroom
Core Classes: Student Union Memorial Center, Individual Rooms (*Break: 3:00–3:30 p.m.*)
Class Advisor Meeting: Student Union Memorial Center, Regent Office, San Pedro
Scholarship Run/Walk: Tucson Marriott University Park, Lobby Level
Association Mixer: Illegal Pete's

Wednesday, January 8

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

Core Classes: Student Union Memorial Center, Individual Rooms (*Break: 9:30–10:00 a.m.*)
Class Advisor Meeting: Student Union Memorial Center, Regent Office, San Pedro
Lunch: Student Union Memorial Center, Grand Ballroom
Core Classes: Student Union Memorial Center, Individual Rooms (*Break: 2:00–2:30 p.m.*)
Graduation Ceremony and Big Bash: Tucson Marriott University Park

Thursday, January 9

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

Core Classes: Student Union Memorial Center, Individual Rooms (*Break: 9:30–10:00 a.m.*)
Class Advisor Meeting: Student Union Memorial Center, Regent Office, San Pedro
Board of Regents Meeting: Student Union Memorial Center, Regent Office, San Pedro
2020 Winter Institute Concludes



WINTER

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

2020 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

Class Advisors

Erin Carney

Silent Auction/Fundraising

Josh Driskell

Erin Carney

Rick Howe

Industry Consultations

Kara Beer

Rick Howe

Lynn Olberding

Steve Baas

Scholarships

Bill Lee

Brenda Gudex

Rick Howe

Kara Beer

Lynn Olberding

Association Event

Mike Johnson

Nick Kieffer

Opening Welcome

Rudy Flores

Erica Pangburn

Graduation Ceremony and Big Bash

Erica Pangburn

Lynn Olberding

Karri Clark

5k

Steve Halter

Institute's Got Talent

Erin Carney

State Photos

Lynn Olberding

Pre-Networking/Social Event

Rudy Flores

Erica Pangburn

Volunteer/Faculty/Staff Dinner

1. _____

Social Media Strategy (Optional)

1. _____

2. _____



WINTER

2020 CLASS ADVISOR ROSTER

Johna Beech, IOM

President and COO
Kenai Chamber of Commerce and Visitor Center
11471 Kenai Spur Highway
Kenai, AK 99611
907-283-3127
johna@kenaichamber.org
Section: 1-2

Sherneka Cagle, IOM

Director of Events and Programming
Peoria Area Chamber of Commerce
100 Southwest Water Street
Peoria, IL 61602
309-676-0755
scagle@peoriachamber.org
Section: 4-1

John Gann, IOM

Program Services Vice President
Midwest Energy Association
7825 Telegraph Road
Bloomington, MN 55438
651-289-9600
johnng@midwestenergy.org
Section: 4-2

Michael Johnson, IOM

President and CEO
National Stone, Sand, & Gravel Association
66 Canal Center Plaza, Suite 300
Alexandria, VA 22314
703-525-8788
mjohnson@nssga.org
Section: 2-1

Andrea Reay, IOM

President and CEO
Seattle Southside Chamber of Commerce
14220 Interurban Avenue South, Suite 134
Tukwila, WA 98168
206-575-1633
Andrea@SeattleSouthsideChamber.com
Section: 1-1

Kathryn Roetter, IOM

Executive Director
Troy Area Chamber of Commerce
405 Southwest Public Square, Suite 330
Troy, OH 45373
937-339-7809
kroetter@troyohiochamber.com
Section: 3-2

Audra Winters, IOM

President and Chief Executive Officer
Marana Chamber of Commerce
13881 North Casa Grande Highway
Marana, AZ 85653
520-682-4314
audrawinters@maranachamber.com
Section: 3-1



WINTER

GEOGRAPHIC BREAKDOWN

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:

California	+4
Maine	+4
South Carolina	+4

Most Attendees in 2018, Texas with 31

Most Attendees in 2019, Texas with 28



WINTER

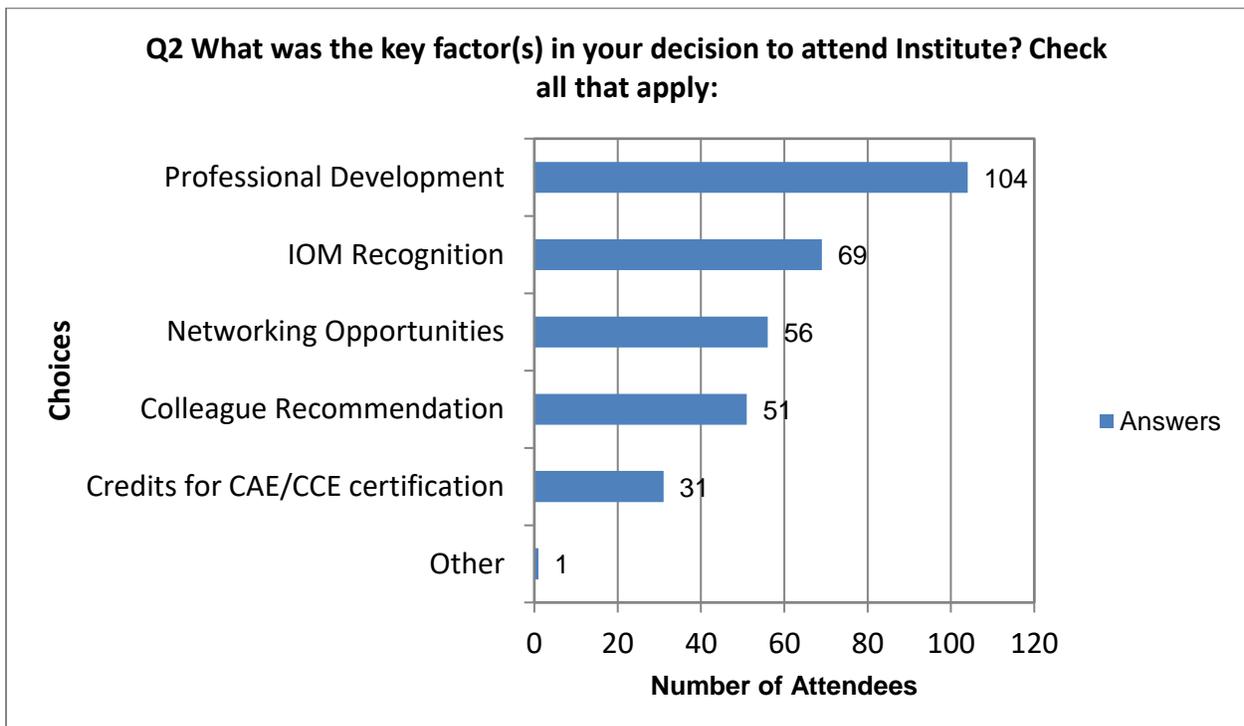
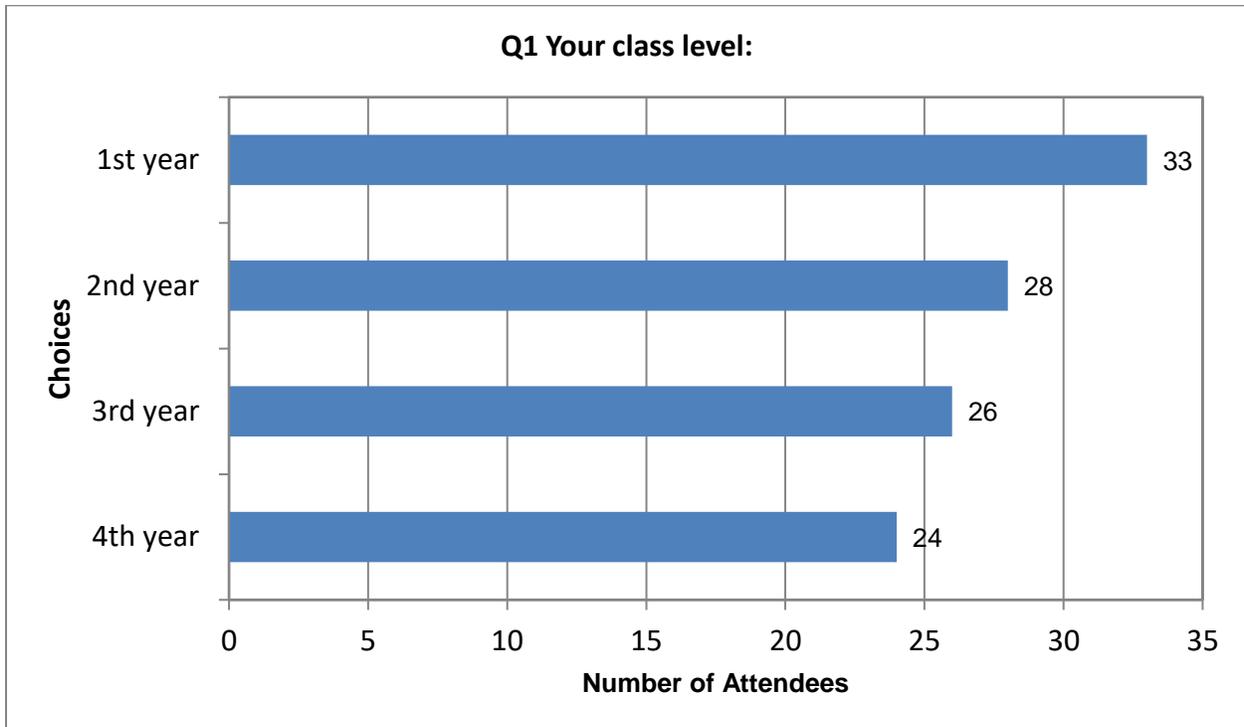
U.S. CHAMBER OF COMMERCE FOUNDATION
Institute for Organization Management

GEOGRAPHIC BREAKDOWN





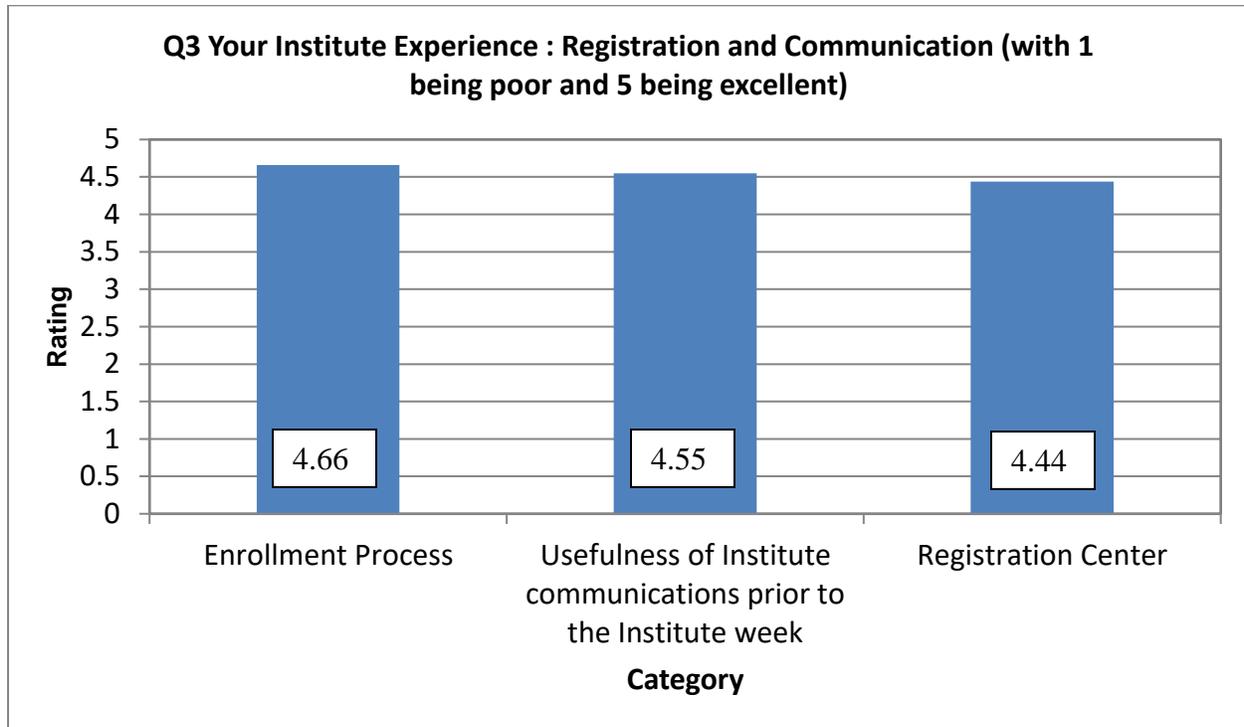
ATTENDEE SURVEY RESULTS AND FEEDBACK



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



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.
- I appreciate getting information but we got what seemed to be a lot of emails prior to event.

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



WINTER

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

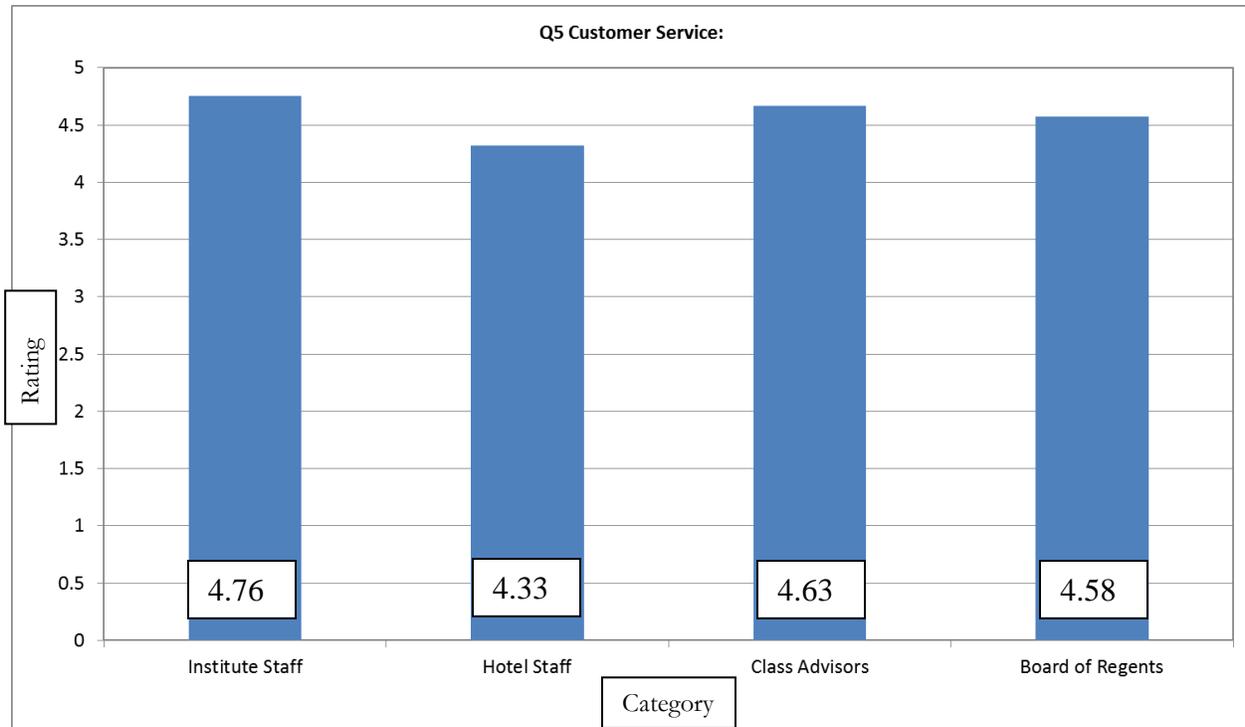
ATTENDEE SURVEY RESULTS AND FEEDBACK

- 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.

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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.

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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.
- 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

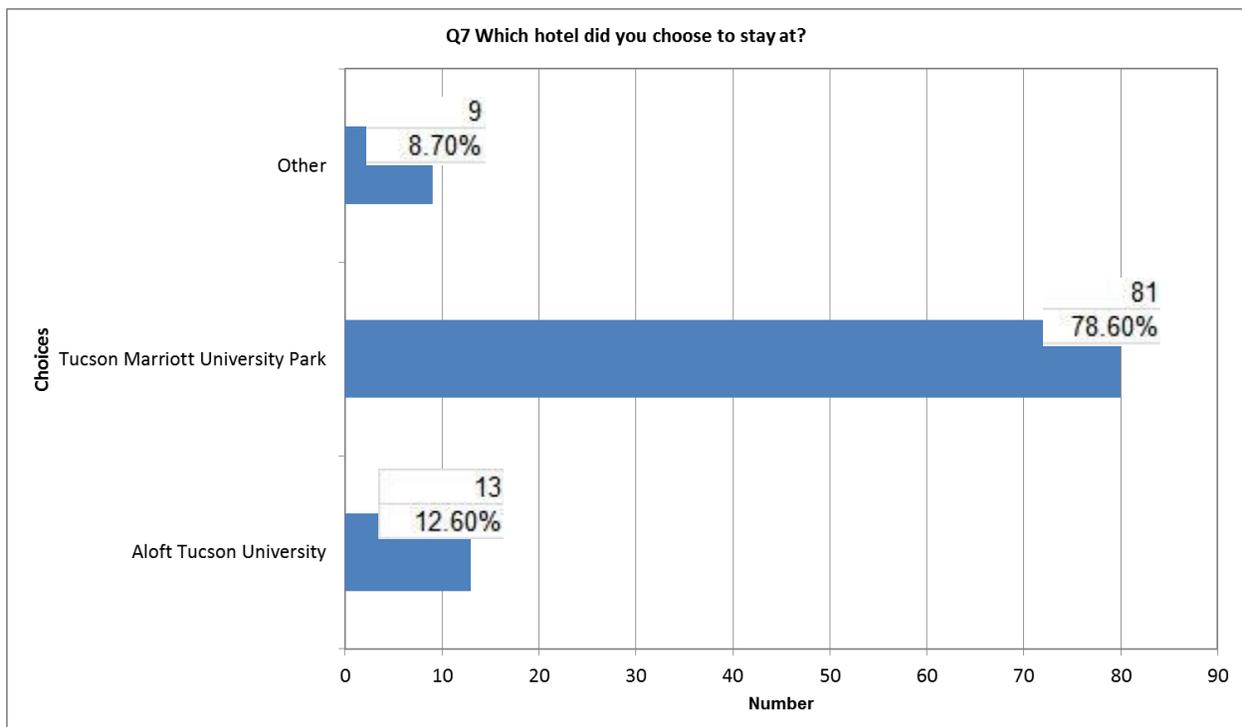
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ATTENDEE SURVEY RESULTS AND FEEDBACK

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.

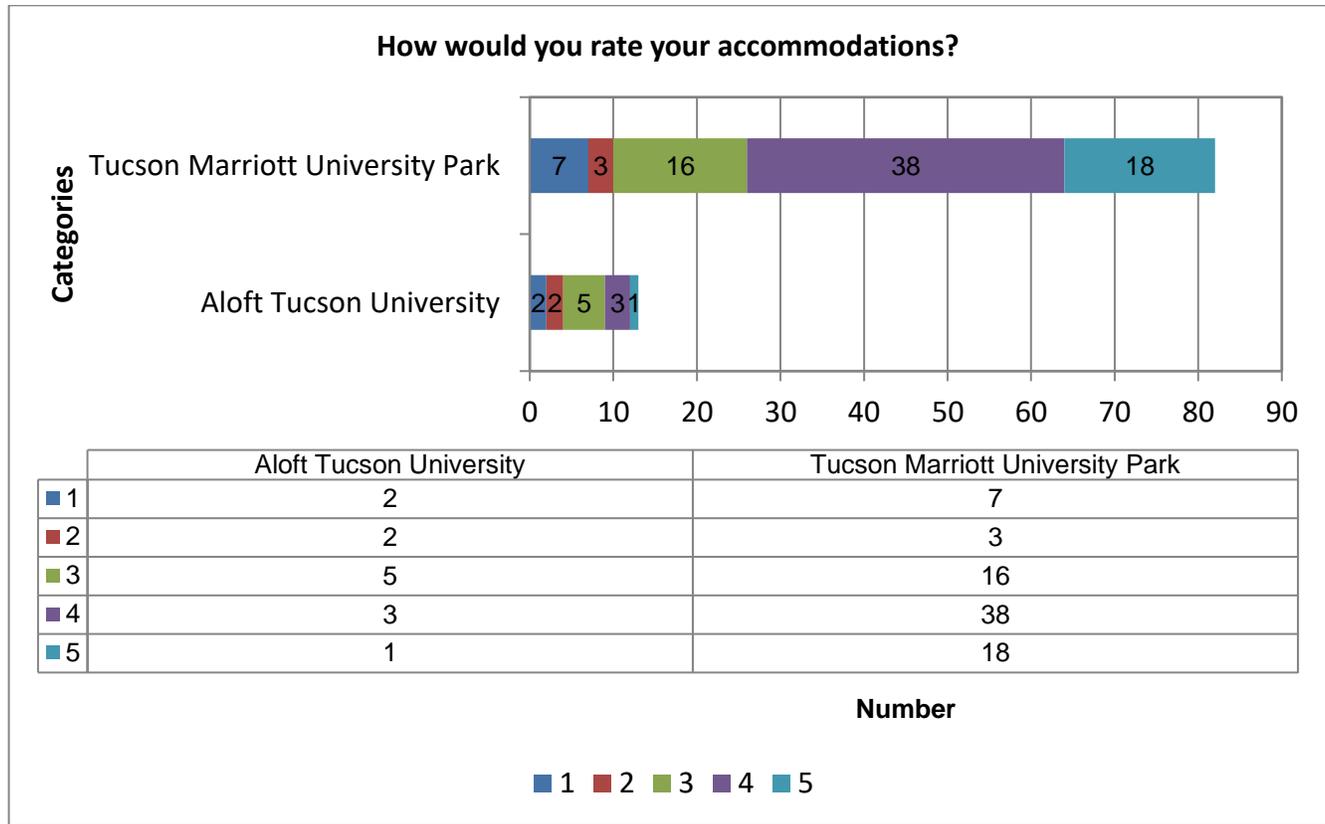
- This was a great year for a customer service experience at Institute! The Marriott staff was great, Class adviser was wonderful and the BOR are always a joy to talk with.
- I didn't really interact with the institute staff.
- Everyone went out of their way to make me feel comfortable and welcomed with the understanding it was long days and nights.
- Great customer service by the people. Kind and friendly.
- My class adviser [removed] was the best.



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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 greatful. 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.

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WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- 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.
- 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.

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WINTER

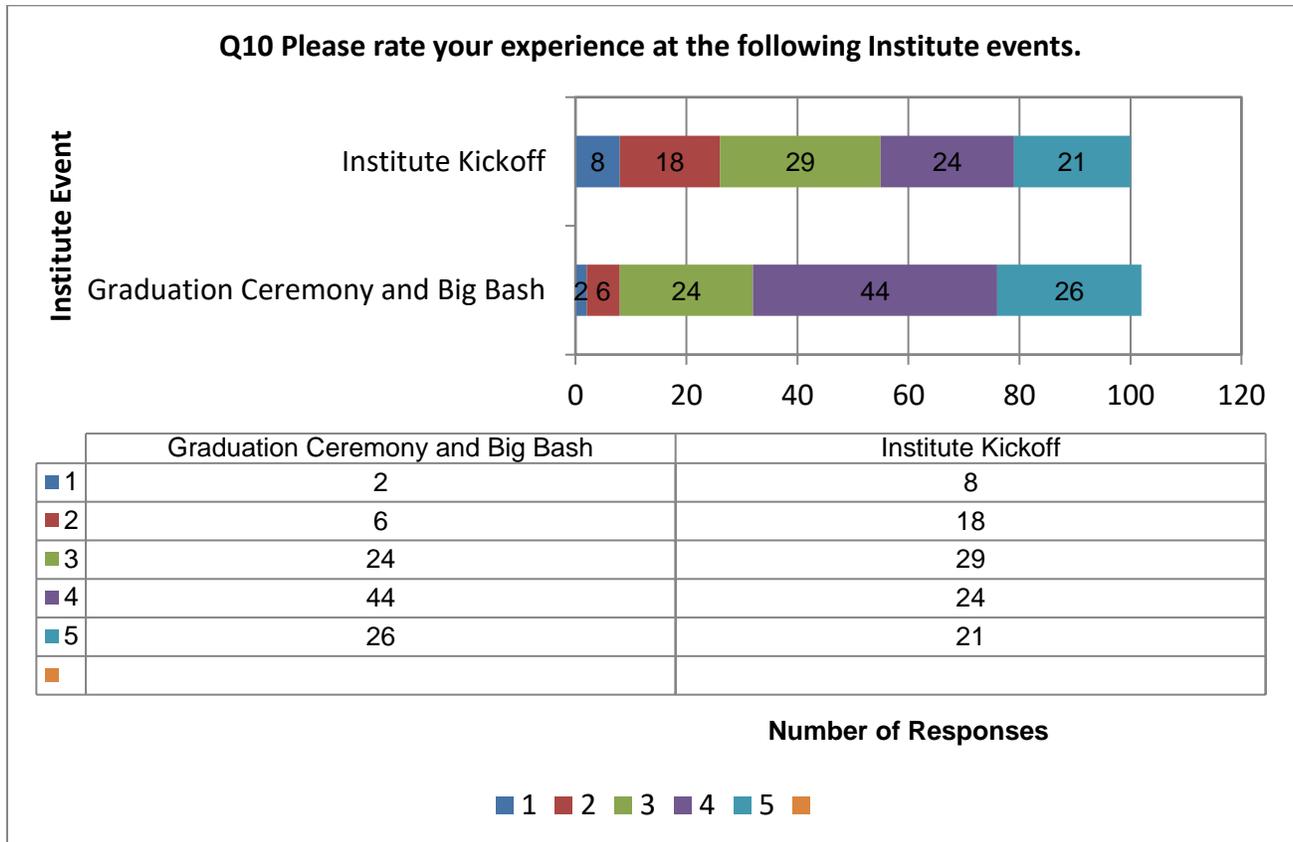
ATTENDEE SURVEY RESULTS AND FEEDBACK

- 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.

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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.

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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.

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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.
- I would not even have the kickoff if it's going to be the same next year. Sorta a let-down.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- 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.

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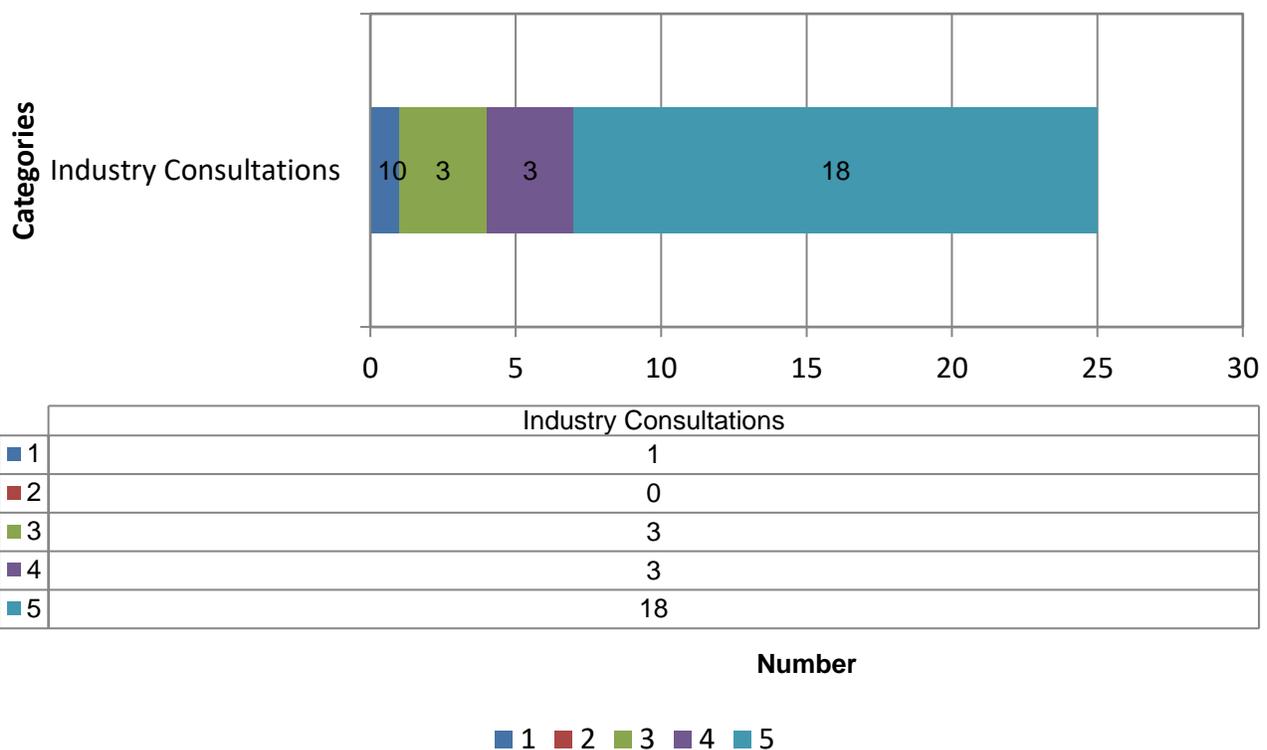


WINTER

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?

Please rate your experience participating in industry consultations.



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.

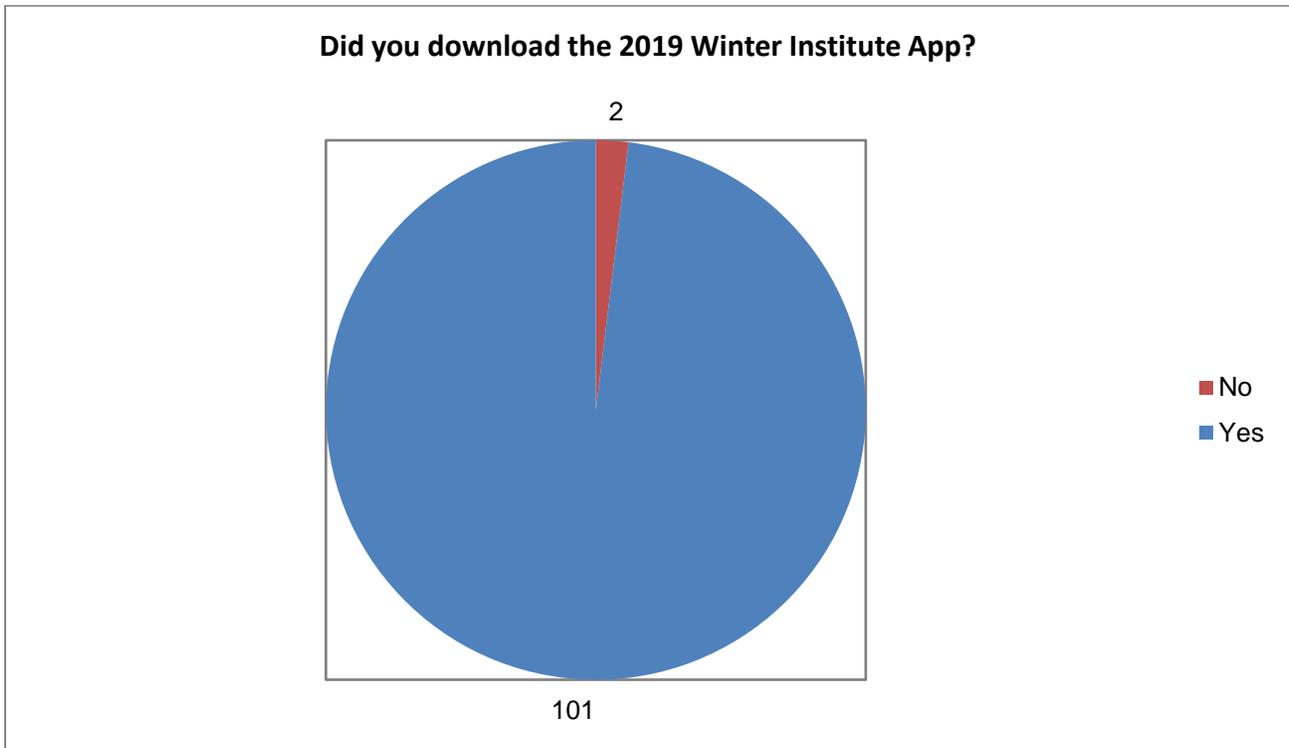
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ATTENDEE SURVEY RESULTS AND FEEDBACK

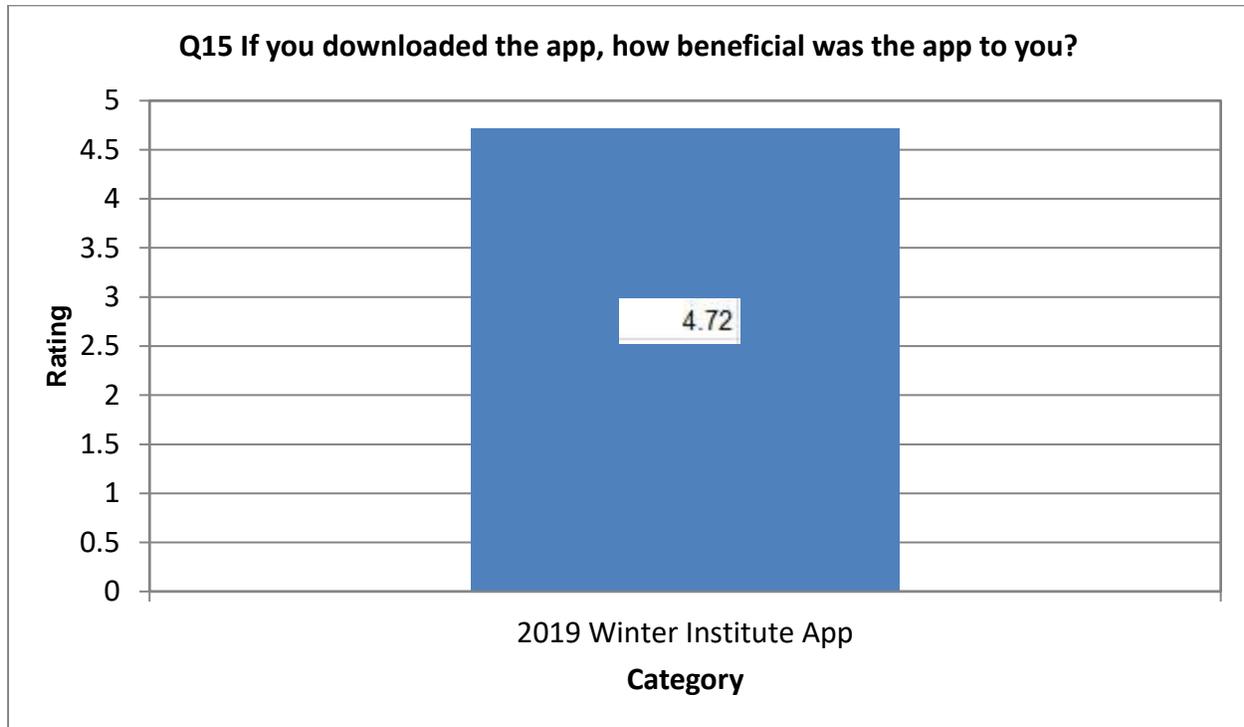
- This was the first time I had ever heard these were available and several other students in my class said the same thing. This was disappointing for all of us to find out, as we missed 2 previous years of this great opportunity!
- Great! Didn't even know about these until this year. I received very 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.



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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!
- Loved it! Great decision in upgrading to this new platform.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

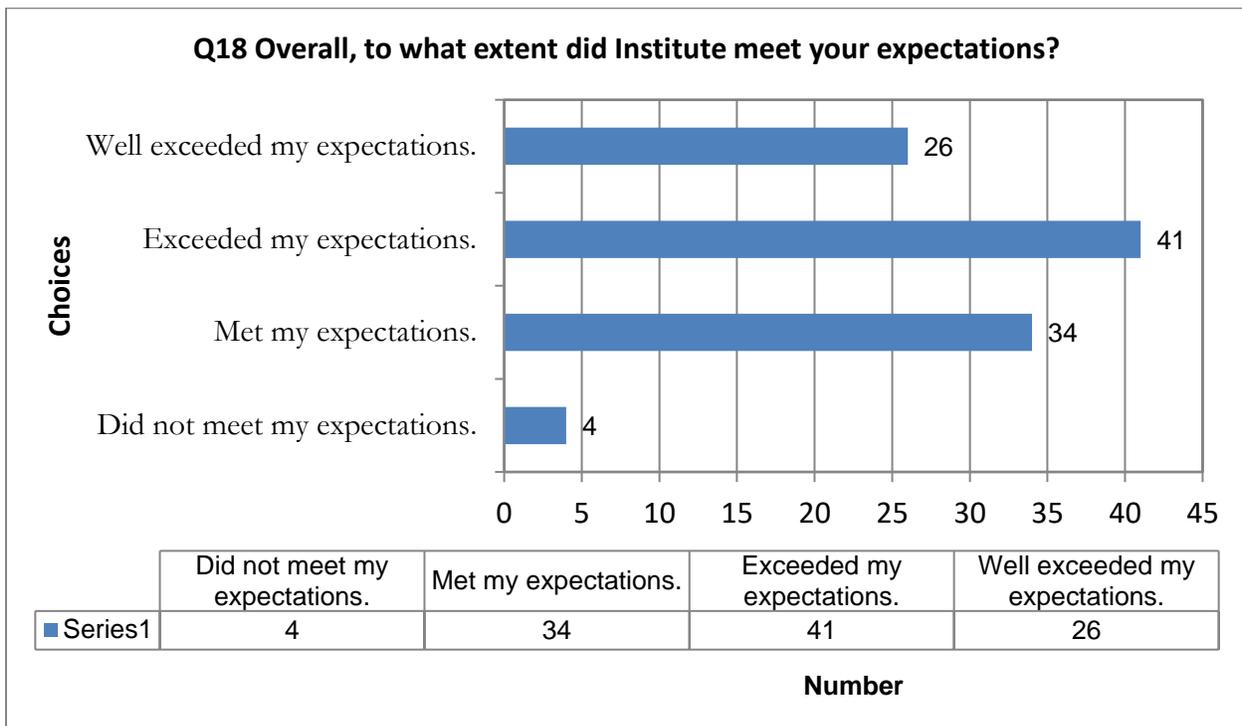
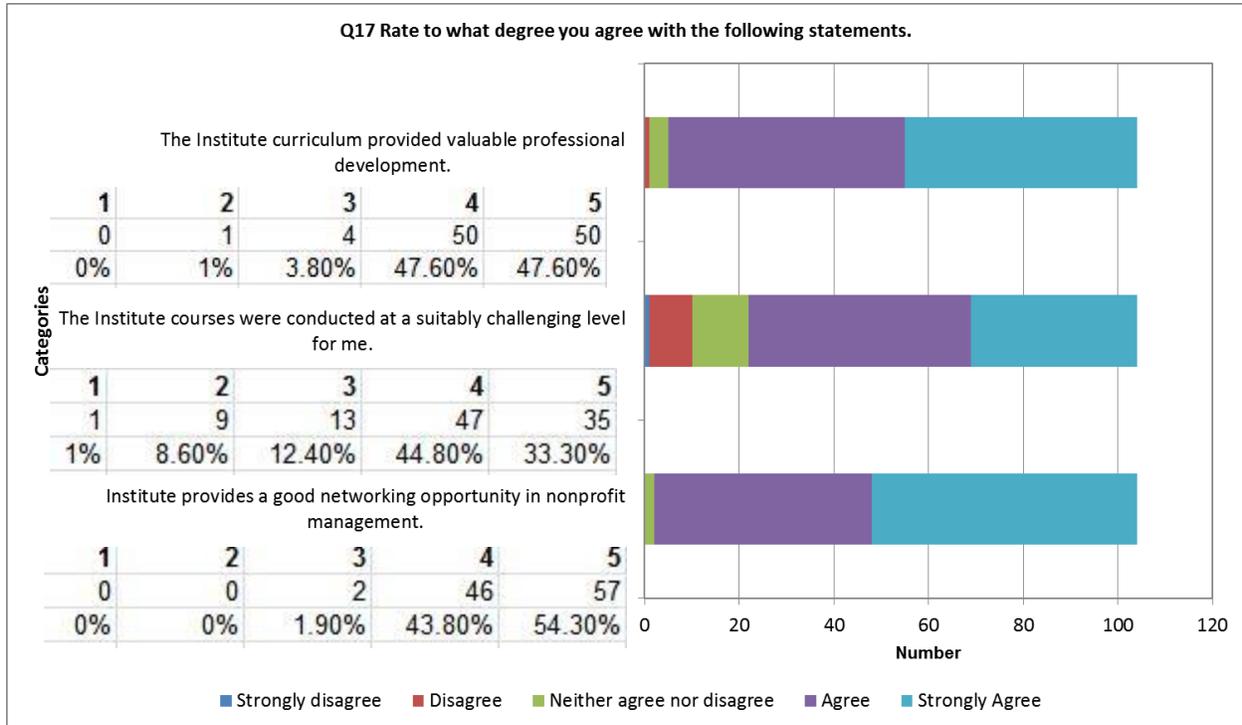
- I couldn't get the app to download on my android.
- Better than the app from previous years.
- I felt like this app was more user friendly than the apps from other years!
- Loved! Very well done.
- App was fantastic. It had more features than expected, and everything worked flawlessly. It was a huge 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.

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



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

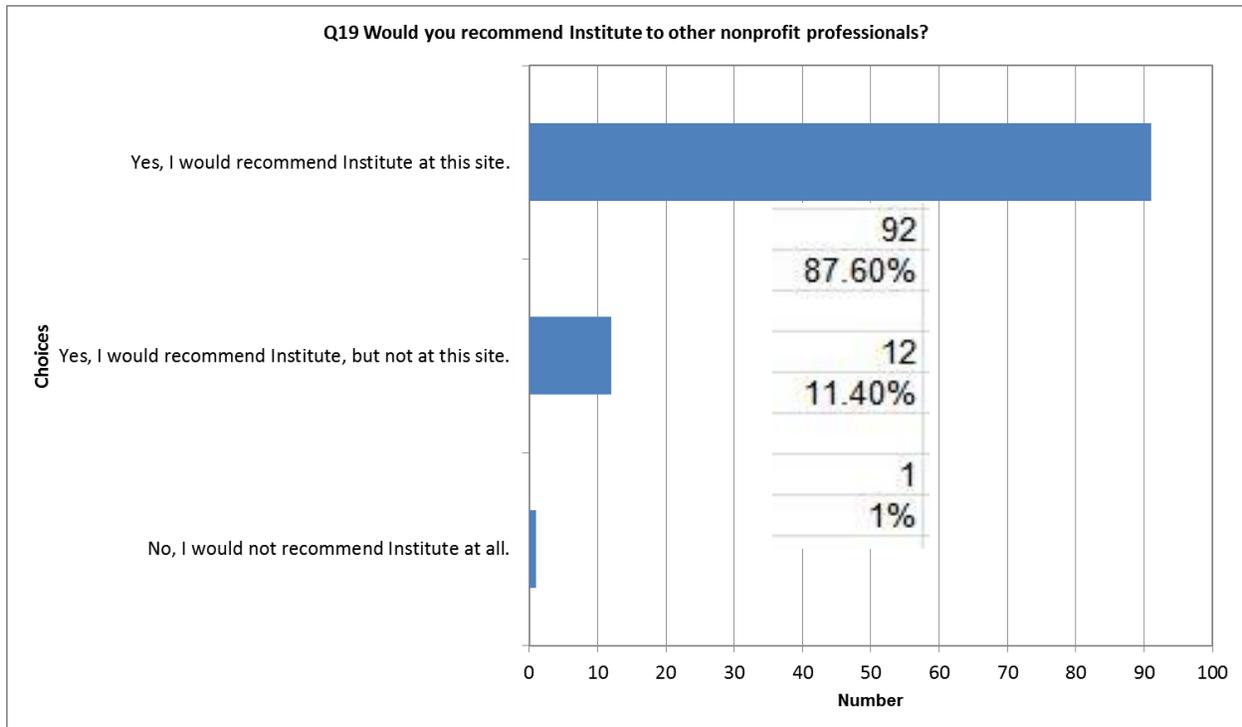


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WINTER

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.

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WINTER

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

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!
- 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.

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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 xyz, 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.
- 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.

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WINTER

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- 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 varies 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.
- 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.

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WINTER

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- 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.
- 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).

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WINTER

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- 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 than 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!
- 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.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- 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.
- 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!

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WINTER

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- 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.

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

MIDWEST



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

2019 BOARD OF REGENTS

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Term: 2015-2019



MIDWEST

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

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Term: 2015-2019



MIDWEST

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

AGENDA

OCTOBER 4, 2019

10:15 A.M. – 12:00 P.M. EDT

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

- | | | |
|------|--|-------------------------------|
| I. | Welcome and Introductions | Angie Whitcomb, IOM |
| II. | Approval of Minutes | Angie Whitcomb, IOM |
| III. | Institute Staff Update | Institute Staff |
| | A. Program Updates and Looking Ahead | |
| IV. | Nominating Committee Report | Jeff Griffin, IOM |
| V. | Analysis of 2019 Midwest Institute | Board Members/Institute Staff |
| | A. Final Enrollment Report | |
| | B. Survey Results and Discussion of Institute Week | |
| VI. | 2020 Midwest Institute | Jeff Griffin, IOM |
| | A. Create 2-3 Strategic Goals | |
| | B. Discussion of Week/Assign Regent Responsibilities | |
| VII. | Other Business/Adjournment | Angie Whitcomb, IOM |

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



MINUTES
JUNE 9, 2019
11:30 A.M. CDT
BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

In attendance: Angie Whitcomb, IOM; Jeff Griffin, IOM; Dawn Johnson, IOM; Jenna Armstrong, IOM; Jason Ball, IOM, CEcD; Desiree Bennyhoff, IOM, ACE; Bill Fleming, IOM, ACE; Tracey Halliday, IOM; Lisa Hoyt, IOM; Corey Hutcherson, IOM; Jodie A. Perry, IOM, CCEO-AP; Peter Murphy, IOM, CAE, J.D., Lisa Weitzel, IOM, CAE; Heidi Zich, IOM; Tami Alexander, IOM; Logan O'Neill, IOM; Charlie Moore, IOM, CCE; Megan Schlimm, IOM; Karyn K. MacRae, IOM, CAE, CMP; Katelynne G. Cox; Mandy Pan

I. Welcome and Introductions

Angie Whitcomb, IOM welcomed everyone to the meeting and introductions were made.

II. Staff Updates and Week Overview

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

III. Photos and Joint Lunch

A group photo was taken and participants caught up over lunch.

IV. Class Advisor Responsibilities

Specific Class Advisor responsibilities were discussed in detail. The first Class Advisor Broadcast was reviewed with the group and questions were answered. The role of the Regent Partner was also reviewed.

V. Other Business and Class Advisor Adjournment

Additional Class Advisor business was discussed prior to advisors being dismissed.

VI. Board of Regents Business

- Approval of minutes
 - The minutes from the May 6, 2019 conference call were approved with no changes.
- On-site regent responsibilities
 - Regent roles and expectations during the Institute week were explained. This included, but was not limited to: information on when to arrive at Grainger Hall every day; how they should network with attendees during meals and social functions; after-hours interaction with attendees; what to do while attendees are in class, etc.



MINUTES
JUNE 9, 2019
11:30 A.M. CDT
BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

- Visiting Homeroom
 - Regents discussed the possibility of visiting each Homeroom.
- Importance of fundraising
 - The group was reminded of the various ways to fundraise and that all funds raised on-site go to Institute scholarships.
- Additional business and adjournment
 - Any remaining business was discussed prior to adjourning the meeting.

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



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2020 SCHEDULE OF ACTIVITIES

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

Sunday, June 7

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

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

Monday, June 8

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

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

Tuesday, June 9

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

Elective Classes: Individual Classrooms, Grainger Hall (*Break: 10:00–10:30 a.m.*)
Elective Classes: Individual Classrooms, Grainger Hall
Board of Regents Meeting: Grainger Hall
Lunch: Gordon Avenue Market
Core Classes: Individual Classrooms, Grainger Hall (*Break: 3:00–3:30 p.m.*)
Class Advisor Meeting: Grainger Hall
Best Practices After Hours: Fluno Center, Study Pub

Wednesday, June 10

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

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

Thursday, June 11

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

Core Classes: Individual Classrooms, Grainger Hall (*Break: 9:30–10:00 a.m.*)
Class Advisor Meeting: Grainger Hall
Board of Regents Meeting: Grainger Hall
2020 Midwest Institute Concludes



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2020 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

Class Advisors

Jenna Armstrong

Silent Auction/Fundraising

1. _____

2. _____

3. _____

4. _____

Industry Consultations

1. _____

2. _____

Scholarships

1. _____

2. _____

3. _____

Opening Welcome

1. _____

2. _____

3. _____

Graduation Ceremony and Celebration

1. _____

2. _____

3. _____

State Photos

1. _____

2. _____

Volunteer/Faculty/Staff Dinner

1. _____

Social Media Strategy (Optional)

1. _____

2. _____

Best Practices After Hours (Optional)

1. _____

2. _____



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

GEOGRAPHIC BREAKDOWN

2019 Midwest Institute

146 Attendees from 26 states and the District of Columbia

State, Number of Attendees, %

Alaska	1,	1.34%	Minnesota	10,	6.71%
Arkansas	1,	0.67%	Missouri	7,	4.70%
California	1,	0.67%	Montana	1,	0.67%
District of Columbia	13,	8.72%	Nebraska	3,	2.01%
Florida	5,	3.36%	Nevada	1,	0.67%
Hawaii	1,	0.67%	North Dakota	1,	0.67%
Illinois	27,	18.12%	Ohio	7,	4.70%
Indiana	5,	3.36%	Oklahoma	3,	2.01%
Iowa	6,	4.03%	Oregon	1,	0.67%
Kansas	10,	6.71%	South Dakota	4,	2.68%
Louisiana	1,	0.67%	Texas	4,	3.36%
Maine	1,	0.67%	Utah	1,	0.67%
Michigan	14,	10.07%	Virginia	7,	4.70%
			Wisconsin	10,	6.71%

Most attendees in 2018, Illinois with 37

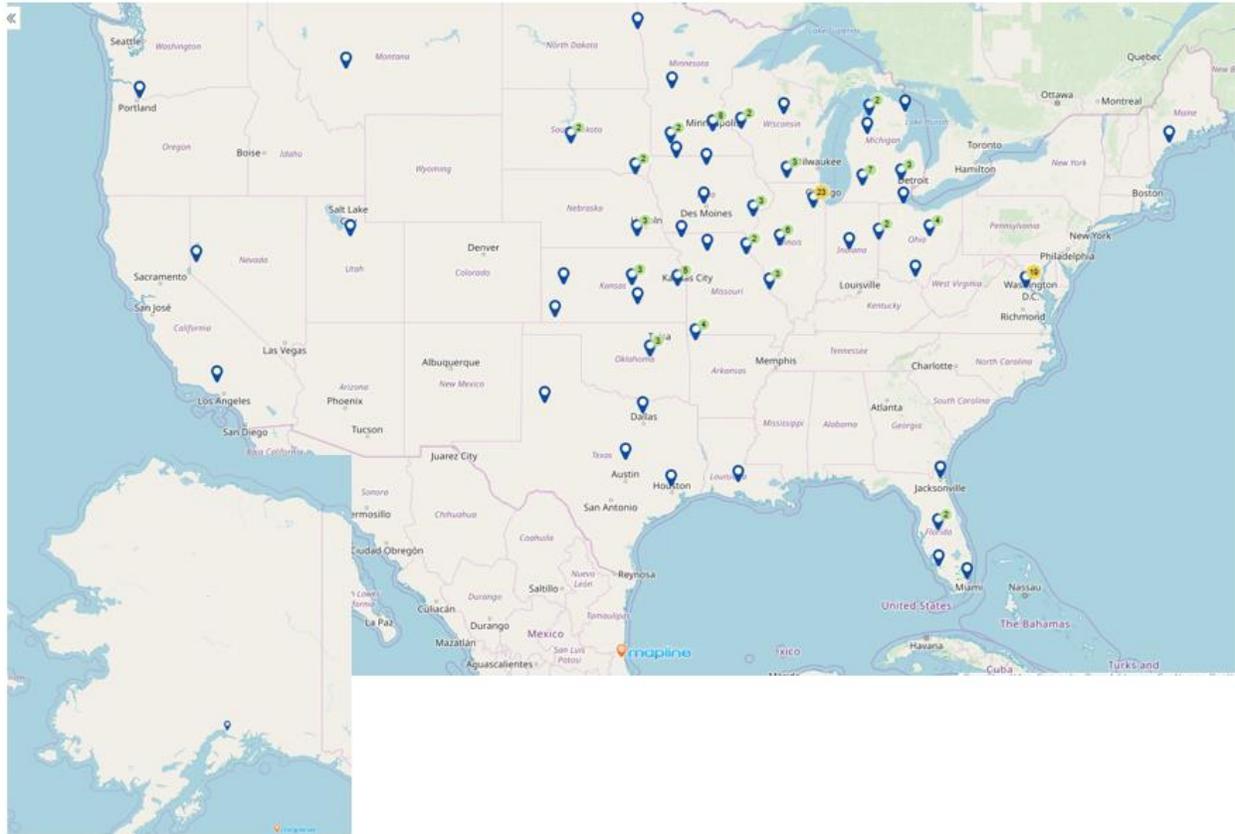
Most attendees in 2019, Illinois with 27



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GEOGRAPHIC BREAKDOWN

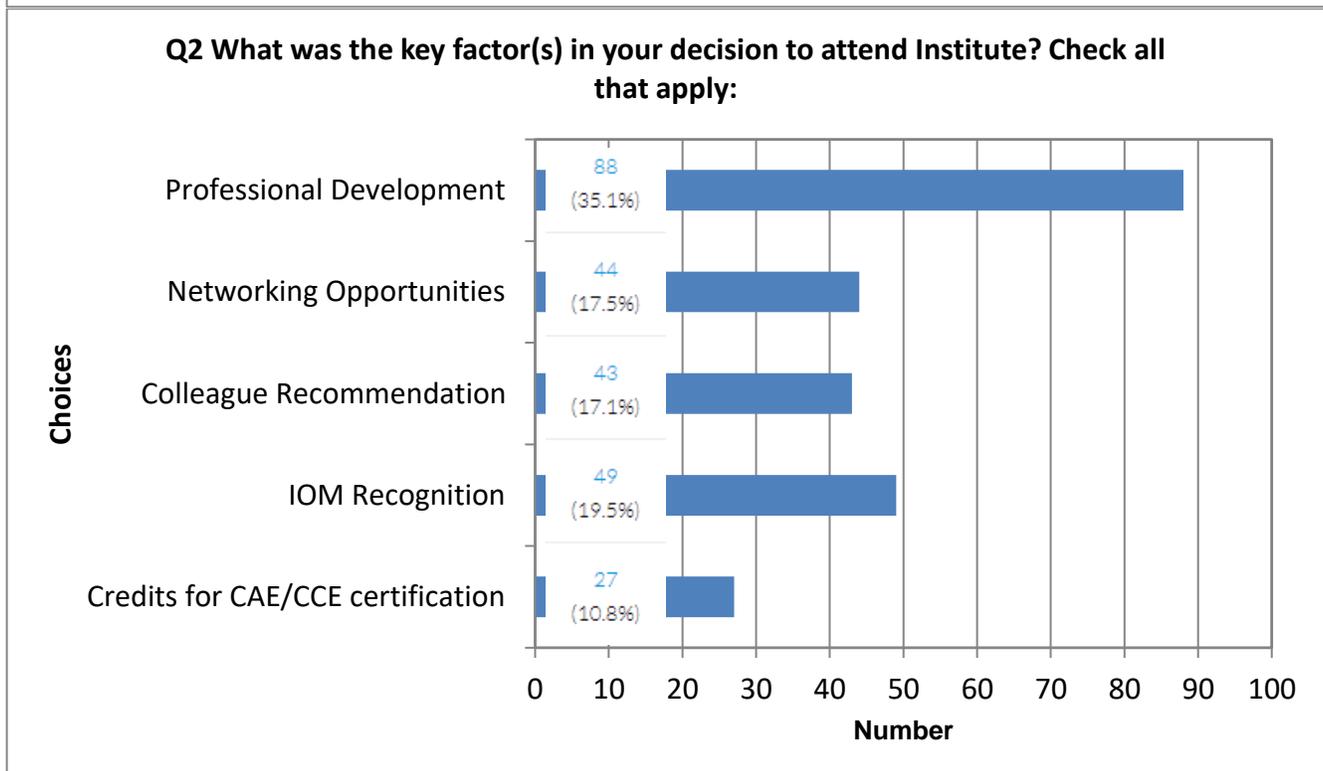
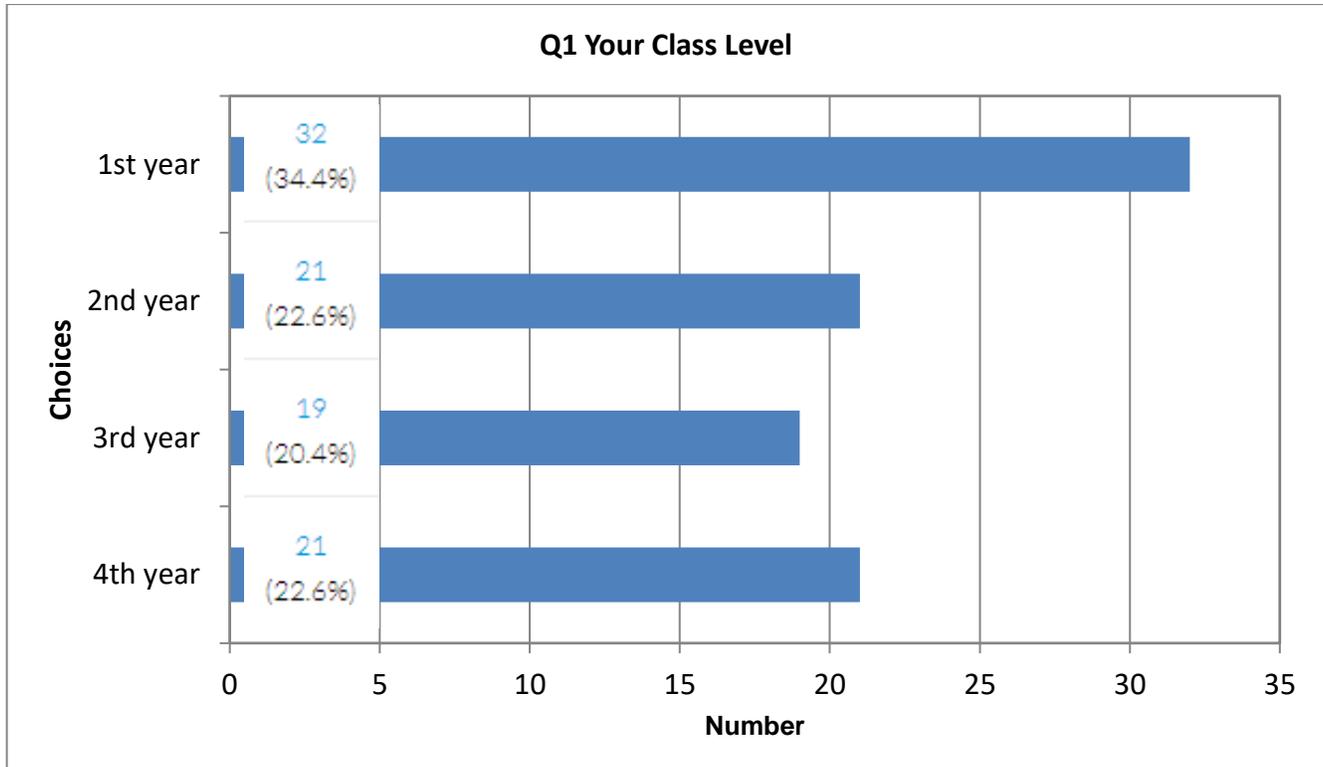




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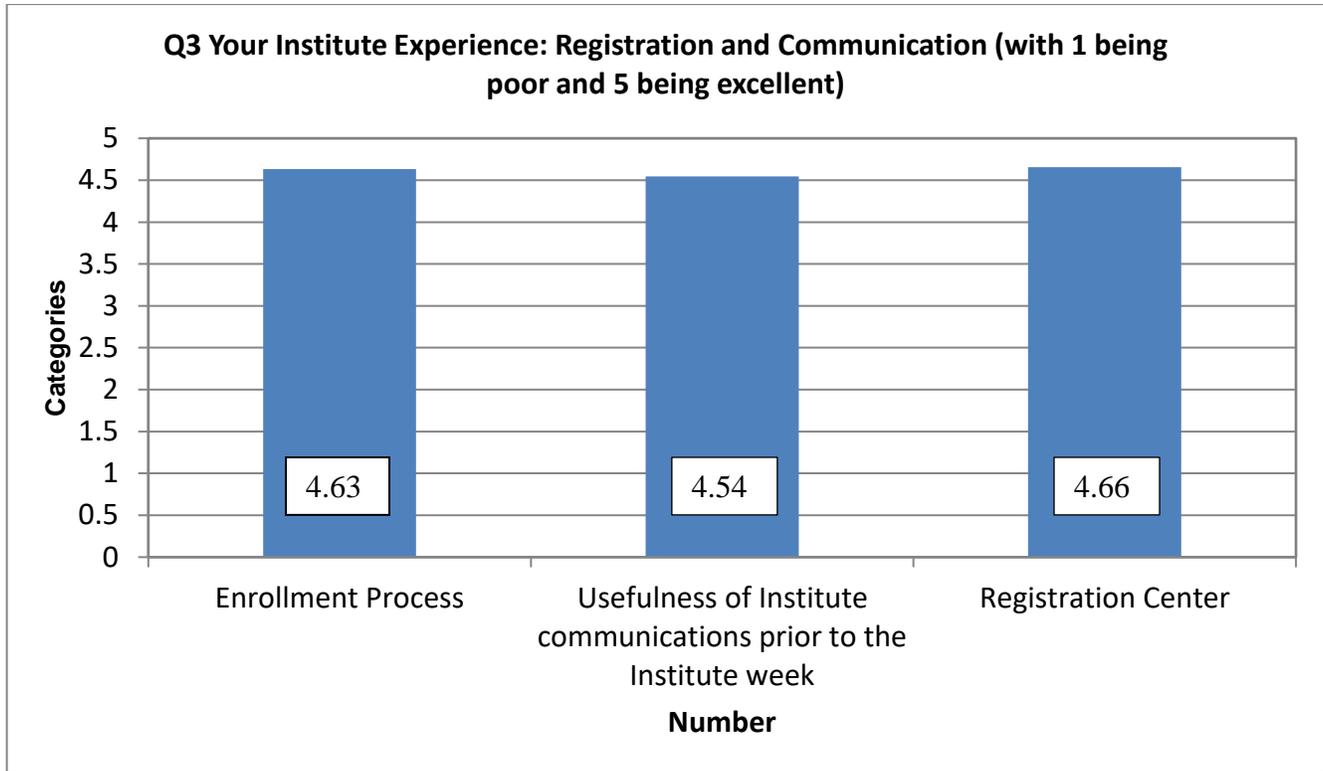
ATTENDEE SURVEY RESULTS AND FEEDBACK



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



ATTENDEE SURVEY RESULTS AND FEEDBACK



Additional comments about registration and communication*:

- The registration process for me was smooth and efficient for all four years.
- I would like more information regarding class handouts. I searched all over the IOM website for handouts prior to attending and couldn't find anything. It turns out that they were in the app which did me zero good as we didn't have the app information until I was on site.
- The key factor I think I would have liked a bit more guidance on was choosing electives. I knew what I wanted to learn more about, but I could've done a bit better not duplicating topics against the core courses. If there are (especially for first year) entry level courses that will duplicate electives being taught, it might be better to not have them available for first years. The result of my having chosen a finance course is that I got two of the same courses essentially. As far as the registration goes, it was so quick and efficient, it almost needn't have the weight of communication it had. [Removed] were there and visible the second I walked into the space, my registration was complete in less than a minute. Which is great! But I was imagining a much more in depth process. Again -- the only comment is the ratcheting down of expectations of a more intense ""airport-like"" screen of information shares and check points." It was confusing on how to get the group registration discount. I had to contact the US Chamber. One thing that would be good looking back on my experience is if the class advisor would serve as more of a concierge for the city, by recommending places to eat, visit, grab a drink, go for a walk - just some general information about the city that attendees will be in for the week. Also, maybe be more helpful in planning evening events for the class.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- [Removed] kept us updated so well!
- The app didn't work correctly. I had to login every time I used it.
- Last year, we had an attendee service center that was accessible a week prior to the event. I enjoyed being able to download and review documents in advance of the meeting. Though much info was in the app, it was more cumbersome and less user-friendly as it relates to class materials.
- Somehow missed the communication to not registering prior to applying for a scholarship.
- Very thorough. I felt very prepared with all of the logistical details.
- I have used Cvent before so it was very easy for me.
- Communication from Institute staff and the registration process have always been easy... each year. Thank you for everything you put into that part of the program.
- One communication was to a link that was not active. I missed at least one communication regarding the app instructions (perhaps that was communicated via facebook?). On my day of travel to Madison I sent an email to an Institute staff member regarding the app, and did not receive a response. Not good.
- I received a scholarship and know why registration couldn't happen until that was done but it made me a little nervous to wait so long to register for IOM. Maybe the process for scholarships should start earlier?
- The new app is a huge improvement in communicating with attendees.
- For some reason, one of the recommendations on my scholarship application did not come through, when I know for certain that I uploaded both recommendations. Therefore my application was automatically kicked out. I spoke with others at Institute who experienced the same situation. I would appreciate IOM moving away from an automated application if there is room for machine error. Or at the very least send out an email to the applicant letting them know that there is a piece of information missing.
- Registration process is very smooth.
- The registration prior to site is useful but gets overwhelming because of the amount of it coming in from IOM and your class advisor.
- Partly due to my creature of habit and not reading all the way through the email prior to registering, this year I was unable to apply for a scholarships through IOM due to registering first. This was changed from years past where we registered and then applied. When I called immediately after recognizing my mistake, staff was less than pleasant or helpful and basically told me that I should have read all the way through. I did not feel that the situation was handled according to what we teach or learn at IOM. Going above and beyond is the way of life in the Chamber world and I felt it could have been a big win for the Institute Staff to be a little more understanding.
- Although there was a lot of information prior to arriving, it was all very welcomed and useful! Super simple check in.
- I personally was very impressed with the communication, and it was nice that prior emails that were shared with the new attendees. This offering no gaps in communication.
- Very smooth and if I did have a question, responses came quickly.
- I love how you formed groups of our class on Facebook and via email. It gave us a chance to connect a bit, even as a new class.

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ATTENDEE SURVEY RESULTS AND FEEDBACK



Additional comments about customer service*:

- I think that the work of all involved is superb. I found support, information, and warmth in all that I came in contact, including staff, regents and our class advisor. Our 4th-year class advisor was simply terrific this year.
- [Removed] was great at providing information prior to Institute and during classes. I would have liked her to be more engaged in more evening events bonding with our class as well. However, maybe that's not a role of an adviser. If not, she did great in all other areas.
- Everyone was very helpful and accommodating.
- Our class advisor, [removed], was amazing. Great energy and communication before, during, and after Institute.
- Stayed at the Hampton and would highly recommend it. Institute Staff, for the most part, were worth the price of the course. However, there were some definite misses. It is difficult to structure such a long course, and not every class really had enough information for 3 hours. On class advisors, please see note above. Not much interaction with the Board of Regents.
- [Removed] was an outstanding class advisor. She did a great job communicate with us what the week would entail and kept us up-to-date on everything we needed to know.

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Institute for Organization Management

ATTENDEE SURVEY RESULTS AND FEEDBACK

- The Doubletree was amazing - and their staff so kind (especially the shuttle drivers). The only suggestion I have is that we all be offered a late check-out since class on Thursday does not end until 11:30am and the check-out time was 11am. Given the block of rooms we utilize and the room nights most of us book (I had 5), it is a rush to be out the door, checked out and bags checked at the front desk by 7:30am. Also, most of us wish to change before flying back to our homes and that is harder to do with no room. Food for thought...especially if they could move the needle to 1pm. As for the Class Advisors/Regents, being a third year in a new venue, I felt a bit out of place and as if I "missed something" in Madison. Granted, being the "new kid" may do that - but being aware and sensitive to the fact that not everyone has been in Madison prior to this year is worthy of noting. I loved [name removed] - she was amazing. She spent a lot of time with me in a Consult and we have had two follow-ups via email. I had never taken advantage of this opportunity but was SO glad I did this year. We have much in common and I feel rejuvenated after talking to her. Wow! Finally, I must share one difficult comment. I dealt with a very awkward situation with my Advisor and a Regent confronting me on Tuesday afternoon about a comment I made the night before at our class dinner that was perceived/believed to be sexual in nature (I did not know inviting people to a gay bar was sexual, but maybe my unnamed, complaining colleague is not as open-minded as me or others) and well, it was handled in a way that made me feel even more uncomfortable and singled out. When information is received third-hand and then you are confronted, it tends to create that scenario. But, as leaders and executives of Chambers - of which both of these gents are - or any organization - I expect better. I expect transparency and most of all, I expect to be spoken to directly - not third-hand. Isn't this the point of IOM and professional development? I have to say, after that happened, it shut me down for the remainder of the week and left me very upset and well, disappointed."
- I stayed at the Hampton Inn this year after a cancellation from Fluno. I've stayed now at Fluno, Doubletree, and Hampton for the conference. Hampton is by far the best experience in customer service and offerings.
- Everyone is great!
- Everyone is always very friendly, welcoming and helpful.
- Everyone has always been super friendly. I just don't interact much with the staff or Board of Regents. It always feels like there are quite a few people around, but I'm not sure what their purpose is.
- Some Institute staff do not seem genuinely friendly, and are not approachable (and do not proactively engage in conversation with students). Same with some Board of Regents.
- We had a fantastic experience last year with our class advisor so it was a high standard. [Removed] was great, but she also came off as a bit rude when she shamed a classmate for coming in right at 8am by requesting we all boo this person (who I know for a fact was dealing with a personal issue before entering the room). She was also a bit forceful with some aspects but didn't provide enough info on other things like the testimonials. I would have liked to have done one to try to win a free registration as I may not have funding next year, but it was never mentioned.
- Hampton Inn seriously had the best hotel staff I've ever experienced! They were wonderful! Loved [removed]. She is awesome! I didn't have a ton of facetime with Institute staff but all seemed well. It was very nice to see such involvement from the Board.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Customer service is never an issue when in Madison. The Institute staff is always easy to talk to and I can always seem to find one around if I need them. I even emailed them before the week and got a quick response from them with the answer I needed. Hotel staff was excellent for a third year in a row. Every single person I come in touch with there is kind and helpful. Class advisors... they rock! Our class always seems to have the best!! Board of Regents, I think we have the best one. Each of them that I have met have been so wonderful, encouraging and supportive.
- Didn't really interact with class advisor this year.
- I loved the woman who was the head of Board of Regents who taught the community development class. Other than that, I felt that the other Board of Regents representatives didn't really want to interact with the first year students.
- The Doubletree staff made the reservation process difficult. The room blocks were booked before the block expired and they were not in the least flexible about extending the number of room blocks for the IOM participants. I would highly reconsider partnering with them in the future. I do not share these strong feedback lightly.
- Outside of my registration issues with IOM Staff, on several occasions while at Institute the IOM staff was not the representation that you would expect. When you are in the event planning industry, you have to be understanding and hospitable. This specifically is targeted toward graduation evening - there could have been more information given regarding graduation details and flow.
- [Removed] were great. This is definitely a section of the survey that would receive increased positive feedback based on personal contact. I had the benefit of knowing [removed] from the state conference in Peoria in Fall 2018. Membership and participation -- as is true in each of our respective organizations -- is what you make of it. [Removed] positive attitude and consistent spirit of support buoys any uncertainty or ambivalence present in a first-year attendee.
- [Removed] has a similarly welcoming energy and the two together steered me into a open space where I was able to process the beginning if Institute and feel confident that my well being was being considered. The feeling of collegial support and oversight of my well being only increased over the course of Institute."

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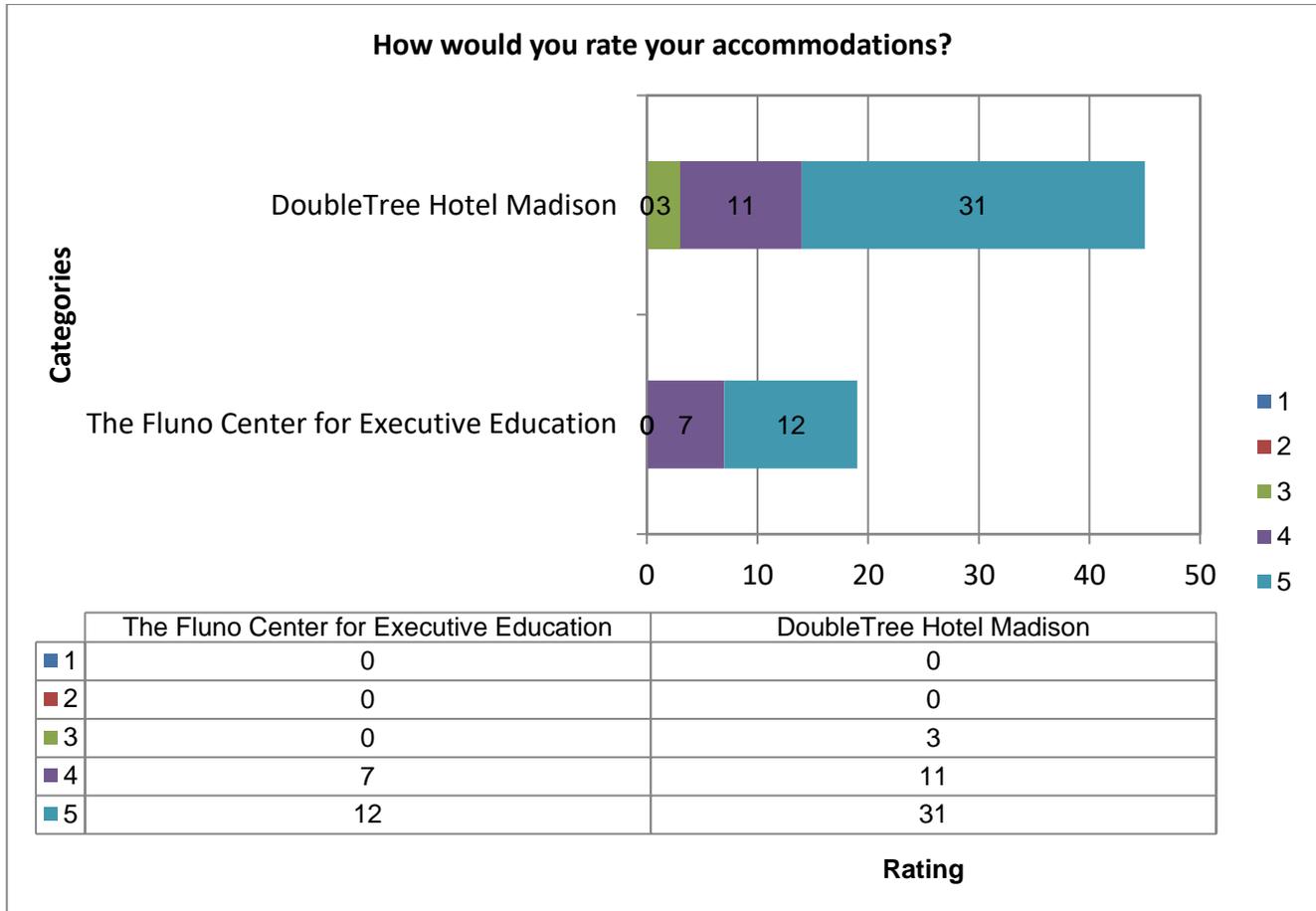
ATTENDEE SURVEY RESULTS AND FEEDBACK



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ATTENDEE SURVEY RESULTS AND FEEDBACK



	The Fluno Center for Executive Education	DoubleTree Hotel Madison
1	0	0
2	0	0
3	0	3
4	7	11
5	12	31

Answer Category	1	2	3	4	5	N/A	Totals
DoubleTree Hotel Madison	0 (0%)	0 (0%)	3 (4.5%)	11 (16.7%)	31 (47%)	21 (31.8%)	66
The Fluno Center for Executive Education	0 (0%)	0 (0%)	0 (0%)	7 (13.5%)	12 (23.1%)	33 (63.5%)	52
Totals	0	0	3	18	43	54	118

Additional comments about accommodations*:

- Having the ability for late check-out on the last day would be helpful.
- Hampton Inn was great!! I got moved due to a maintenance issue but was very happy with the room and staff!
- Hotel staff at the DoubleTree were AMAZING!
- The Hampton Inn had great rooms, service and breakfast. Enjoyed my stay there.

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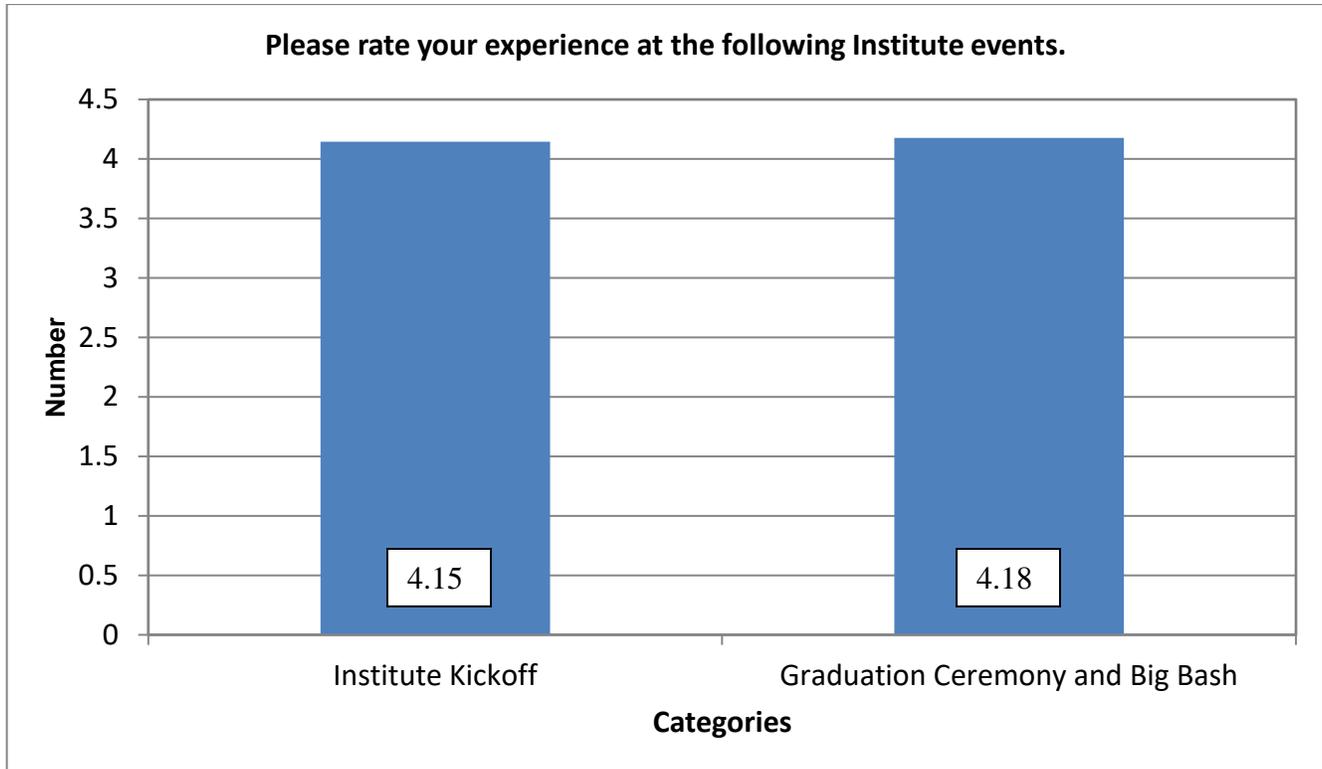
ATTENDEE SURVEY RESULTS AND FEEDBACK

- The Hampton is by far the best hotel in the surrounding area!
- Communications from DoubleTree GM regarding relocation to Hampton Inn was top notch.
- The team at the DoubleTree is phenomenal!
- Great accommodations, parking, customer service, breakfast, location.
- See my notes above about late check-out!
- We had a room booked at the Double Tree, but were one of the rooms that was moved to the Hampton (I believe, the reservation was not under my chamber.) The hotel was fabulous, the breakfast was delicious, staff was welcoming and the walk was easy!
- Great location in terms of ease of walking to class and night life. The shuttle service was very helpful as well.
- Stayed at the Hampton Inn - loved the stay. Not sure if it was comparable on price, but Institute should look into blocking off rooms there as well and asking for a block rate.
- Staff was friendly and accommodating.
- My flat iron was damaged in the course of the day. It was working in the morning and when I returned to my room that afternoon it was not working. I had to replace my flat iron while in Madison.
- Doubletree provides both great service and amenities. Their service is top notch.
- The hotel was nice, however, I was initially reassigned which was communicated via email without explanation. I ended up reaching out and they put me back at the Doubletree - but it was a frustrating experience.
- Wish their restaurant was open before 5 pm.
- I also heard that those who were relocated to the Hampton Inn were very pleased with their stay.
- This year I had a unique circumstance and actually drove home each day. I plan to stay in the Fluno again next year. I have always enjoyed Fluno and found the registration (and cancellation) process to be quite easy.
- Fluno center once again is a great location, but the bedding was off. Numerous of my classmates noted the horrific pillows that caused us all bad night's rest.
- As stated above, Hampton Inn (which we ended up in due to a water main break at DoubleTree...as we were told) was phenomenal! We thoroughly enjoyed our stay there!
- Totally fine but nothing to write home about.
- Pricey.
- The US Chamber can't go off the grid and recommend places they obviously wouldn't have the ability to certify, but as a regular user of AirBnB for both economic and experiential reasons, I doubt I would opt to stay in the hotel in Madison. At the time of the reservation, I had the benefit of being reasonably familiar with the layout of the City of Madison and the incentive (I was responsible for the cost of my accommodations) to keep the cost down. These two factors plus my own independence and curiosity make this option really ideal for me.
- I would highly suggest securing a room block next year at Hampton Inn - the accommodations are much nicer than Doubletree and Fluno and breakfast is included!

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ATTENDEE SURVEY RESULTS AND FEEDBACK



Additional comments about events*:

- I did not attend the Big Bash.
- It would have been nice if the graduation reception could be located closer to our hotels or near places that we can easily get to afterwards without walking ten blocks. Also, if the above consideration is not an option, than it would have been nice if the music could have continued until 10 or 10:30.
- Hard to hear speakers at the graduation ceremony. Otherwise, quite enjoyable.
- The sound at Big Bash was very low. It was difficult to hear most of the speakers from where we were sitting. I would like to see an organized time when each class takes a class photo rather than a couple of us trying to wrangle everyone in. Could this be organized by the class advisers?
- The Institute Kickoff was the best back in 2016 when we went to the Double U and did a Bingo type get to know you activity. I would say the Homeroom time could be shortened to 30 mins and Kickoff could then be done by 5:15.
- Nitty Gritty - nothing to do with us - but warm temps in the establishment with having it held there.
- Could not hear at graduation and there was not enough space to even sit comfortably in the chairs. A lot of people didn't even have a chair. Did not seem very inviting for something we were told we needed to go to.

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Institute for Organization Management

ATTENDEE SURVEY RESULTS AND FEEDBACK

- The Graduation Ceremony and Big Bash were particularly meaningful to me this year. Thank you for providing a beautiful send-off of our four years at Institute!
- The entree was a little...sparse.
- I heard that this year Big Bash was a little shorted, my class had a ton of fun dancing! I am sure we would've stayed as late as the dj played.
- As a first year, kickoff was a little clicky and I felt like the outsider and everyone else was in on the joke.
- The kickoff was kind of a painful experience - especially the first year. Like IOM was being sold way too hard. The Pep-Rally experience was unnecessary and a little off-putting for a professional course. It wasn't so bad after the first year when you knew it was coming, but again, unnecessary. The Graduation Ceremony was, for the most part, done well. Probably could have opened the bar sooner. The food was pretty poor. Nice venue this year.
- Graduation dinner was very slim and the little leg on the breast was gross. I had two tiny slices of carrot on my plate. They could have done better for IOM, I feel they took advantage of the consistency. The DJ acts like he is from the 80's...could use more variety in music choices. One line dance song every few is fine not all at once...made everyone leave.
- Really enjoyed the previous snacks that were distributed and disappointed those weren't there this year. Kickoff seems like a waste of time. I would've rather fly in later to be prepared for Monday vs. the need to be at kickoff. Never really understood the point to that event. Graduation "rehearsal" didn't really provide any information outside of what was re-communicated during Wednesday's class. Graduation felt very unorganized and all over the place, especially in regard to graduation ceremony seating. A large portion of the 4th year class left rather quickly following dinner. Not sure what you could have done about it but I hated to see that the majority departed so early - maybe add some ways to entice attendees to stay for the full event or at least make it a point to request full attendance ahead of time.
- I think the graduation could be updated in a way that would be more enjoyable for everyone. Open up the graduation and maybe 1 drink to all classes and then do the dinner as a smaller affair, maybe at a nice restaurant, for just the 4th year class. It would be more intimate and fun for the graduating class, the food would be better and it could be tailored more to the interests of the group. This year, the food was mediocre, dancing didn't start until late, and when there is so much to do and see in Madison it seems silly to try to keep people in a conference center with mediocre conference food.
- Suggestion would be to have input from the 4th years in planning the Big Bash if you would like them to stay. We were very unsure of what was going to happen (if anything) after dinner so we ended up leaving. I remember Year 1 the Big Bash being so much fun. Hate to say it but the food was horrible. Disappointing that it is exactly what we serve for Chamber Luncheons. I guess I was hoping for more at a graduation party and after just spending about \$12,000 at Institute. Graduation was very unorganized. Again, could Year 4's help with this?
- Would like more interaction and/or comradery with the other years. I think we could learn a lot from those graduating, whom we will not have the opportunity to see again in the next years of our journey.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Kick off was fair. Nothing too exciting. Would have been fun to have a social on site for the kick off or something to encourage classes to mingle instead of forcing them apart. Graduation meal was fair. Wish more IOM attendees would have stayed longer. Class seats may be a good idea with reserved tables for classes.
- The atmosphere at Big Bash was different this year than last; felt like less of an evening event. Sounds crazy, but I think the fact that we were in full lighting during dinner made a difference, as many of us elected to leave earlier than we likely would have. I think the graduation was well-run and special for the graduates.
- Traveling all day on a Sunday for just the kickoff is a little difficult. Especially since I drive seven hours. If you had the kickoff and then had a dinner for all classes, that seems like it's a better use of time.
- Graduation process needs to be better communicated to 4th years.
- My experience was only average because I'm not comfortable in those kind of events.
- Kick off was just fine. The graduation ceremony was very nice- love the location. I would recommend having the dinner served earlier (move up the ceremony time) and the dancing time extended. It felt like the evening came to an abrupt halt.
- Unfortunately I wasn't able to attend either though I would have loved to.
- I could've missed the kickoff and it would not have had an impact on my education.
- I had a guest attend the post-graduation dinner and I must say that for a fee of \$65.00, the actual dinner was less-than-dollar worthy. I tiny piece of chicken on a bed of mashed potatoes was rather embarrassing for me to have served to someone who drove all the way from Chicago to see me graduate, not to mention the price. Catering at Discovery should step up its game, or perhaps consider previous venues which did a better job, if I remember, first and second years.
- I find that the kick off hasn't really been all that useful these past two years. The first year there was a gathering that evening where we all were able to mingle and get to know each other. It's beneficial for the first timers.
- I find the kickoff to be a waste of Sunday. I understand wanting people there to ensure a successful Monday but It just feels like a waste of time at this point. As a 3rd year, I knew the expectations, I knew the schpeel, etc. It just felt like a waste of time.
- I love all the class spirit at Kickoff (especially us, YAY Class of 2021!). For graduation, I liked the ceremony seemed shorter this year, so that was good. The big bash was a bit of a flop- the DJ is not usually very good and noticed a lot of people leaving early to spend time elsewhere. Also, where was the cider option for a drink from last year?!
- Institute kickoff to include a meet and greet mingle. Great kickoff with the rooftop social and scavenger hunt card. Graduation Ceremony - include a short motivational speaker while attendees are eating? Eliminate the DJ, feels like a wedding reception.
- The Big Bash could be enhanced with a little input from the graduating class. Perhaps they could all sit at a "head table" for extra attention.
- The meal at the Graduation Ceremony was a bit light. It may be better to go with heavy hors d'oeuvres.
- Graduation was seem less this year.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- In the 4 years I attended IOM in Madison, the graduation reception has become less and less of an event. We didn't get any input on the graduation process, we didn't get flowers, we didn't even have flags on our name badges. My guest did not stay for the dinner, and I am glad because that dinner was NOT worth \$50. I would encourage making next years 4th year students feel a little more special. Maybe have flowers sent to their office AFTER the week is over, maybe have everyone attend graduation but instead of a meal for everyone, they break out in class dinners and the graduates get a NICE meal.
- I am not one for inflated displays of spirit, replayed oaths of success and allegiance, or promises of incredible life-long friendships or life-changing growth. If this is all true, confidence in the product is better displayed with simple, direct delivery of fact and personal interaction. C+ for the auditorium portion of the kickoff. A for the Nitty Gritty. We are all social beings. We will all fall into place with the proper support rails in place. I state the above with the knowledge that many do not desire a low-key intro to a demanding schedule of events. Enthusiasm is necessary in our field and sometimes faking it until it is genuine is the best way to roll for large groups. Obviously my first year status plays into this. The other factor I believe makes my perspective different than other attendees is the proximity of my chamber and it's programs and events to other City of Chicago neighborhood chambers. We have collegial good will and networking in every direction and up and down the food chain. Whatever sense of ""filler enthusiasm"" is sensed in the beginning of the program was for the most part substantiated for me by the end of the program. The graduation was not without it's expected repetitive comments and addresses from folks relatively unknown to first years (I realize this is necessary and the unknown drives attendees to search for the "ah has" obviously present in the 4th years. The conversations and particularly one I had at dinner occurred naturally and provided me with the sense of camaraderie I felt thrust upon me in the opening days of Institute. I actually really commend the planners for the structure of the final day. No big farewell -- folks move on in their own time at their own pace -- get up for class at the same time, no fizzling out -- boom and gone. That's the right balance for the conference.
- The Big Bash seemed to be shorter this year... Still fun, just way shorter.
- There needs to be more instruction/guidance shared about the details for graduation. We were asked to arrive early for pictures and it was a bit chaotic and no one seemed to know what was happening. No one instructed us once the actual graduation ceremony started of where to go/ line up order / if we sit or stand or when to make our way to side of stage to walk across stage to receive certificate. It just seemed very clunky to me...
- Walking in, line up and pictures did not go smooth. They seemed very disorganized and rushed. Graduation dinner was not impressive and if I had purchased a ticket for my spouse, I would have been very disappointed.
- It was hard to hear at the Graduation Ceremony.
- Seemed like a lot of wasted time prior to meeting in auditorium. Maybe have ice breaker or activity of getting to know each other again. Refresh memory or give reminder of week long activities.
- At the kickoff I loved how the regents took time to mingle with everyone, that was noticed and really nice. The venue was very loud and very, very hot. Networking was pretty much impossible. The ceremony was nice and so was the big bash, we all had a great time. It was hard to hear the ceremony so it would be nice to get the audio all figured out.

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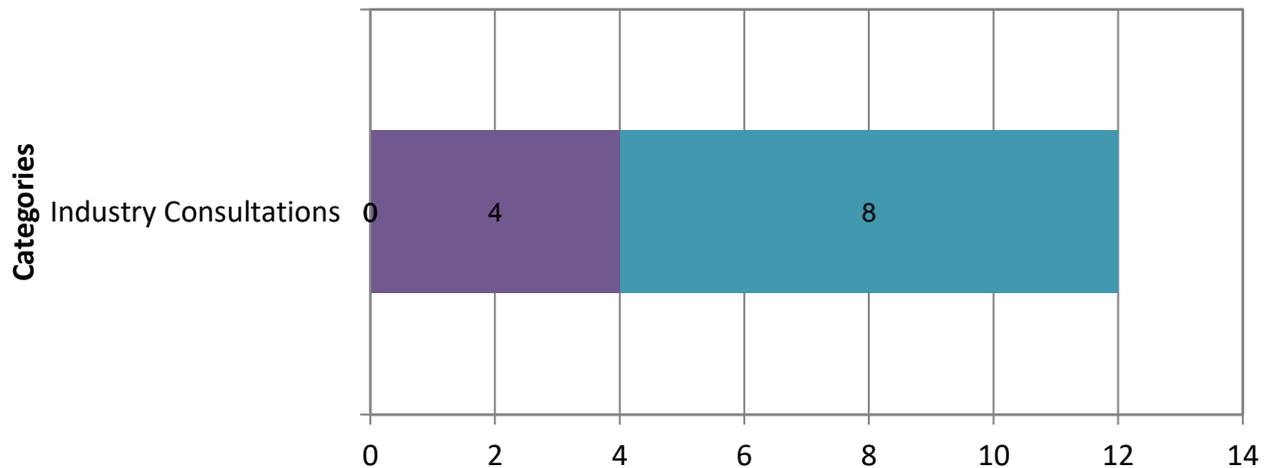


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ATTENDEE SURVEY RESULTS AND FEEDBACK

- I appreciated the opportunity/flexibility on Sunday evening to network with classmates instead of attending a required IOM networking event.
- My first year we had a kickoff bash which I think set the tone for the rest of the week. I understand reducing extra expenses (if that is the reason for it disappearing) but I think that needs to be brought back in some way. We could all meet at a local bar/restaurant and all cover our own food/drink tabs. It was just a great way for first year people to begin meeting people from other classes, a good way for other classes to network with those outside of their core group. I found this year harder than previous years to get to know those from other years and getting to know people is pretty easy for me. The Big Bash is always a fun event and I love the location we have had it had the last two years. My one suggestion is for the bar, can you have sweet drink options. The last two years there have been great beer and wine drinks BUT nothing for us sweet drinkers. Just maybe have a moscato option please!!

Please rate your experience participating in industry consultations.



Industry Consultations	
1	0
2	0
3	0
4	4
5	8

Rating

1 2 3 4 5

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ATTENDEE SURVEY RESULTS AND FEEDBACK

Answer Category	Choices						Totals
	1	2	3	4	5	N/A	
Industry Consultations	0 (0%)	0 (0%)	0 (0%)	4 (4.5%)	8 (9%)	77 (86.5%)	89
Totals	0	0	0	4	8	77	89

Additional comments about industry consultations*:

- Always good to talk one to one with another professional on a topic!
- I did not find a use for this, but I'm sure if I was a new CEO of a Chamber I'd be full of questions that might be best answered through a one-on-one consultation, so I would encourage you to continue finding experienced Chamber executives to help provide these consultations.
- [Removed] was an excellent and encouraging resource.
- I have learned so much from so many of the consultations that have presented at IOM. This year it seemed that some of the regulars weren't as sold on presenting us new and exciting content as they have in years past. There seemed to be a few in our class that were not happen with [name removed] as he seemed to "sell" his expertise more than he has before.
- Most thankful for [removed] time and ideas.
- He connected me with a colleague that was more knowledgeable in my specific request.
- I met with [removed] and we had a great conversation about Workforce and Community Development. He even linked me to [name removed] for additional insight.
- Did not do one this year as I felt like I knew people to connect with on specific topics but have in the past and they are excellent. Keep them available.
- I still have an interest in these but have not yet taken advantage.
- This is an area that is perhaps impossible to convey clearly to the first years. I was unaware it was peer counseling until day 3. It seemed to me to be something the regents could be available for as well. Not knowing most of the people, I was unsure how this fit into the greater picture. And reflecting back, it seemed to me that I would've had to have missed class to accomplish one of these consultations. I would've needed a prompt on what the available areas of expertise were for individual consultation. Of particular interest to me would be leveraging Chamber skills and experience to gain employment in an adjacent field. Another topic similar in scope would be pathway to ACE or AAE after IOM is complete.
- I was exhausted and didn't attend this. Perhaps this could be done via webinar a few weeks after IOM, I think there could be separate ones for each breakout and they would be well attended.
- See my notes above about [name removed]! Amazing professional and generous colleague. Thank you!
- I meant to sign up and never got it done. I like the idea, though.
- Didn't even know these were an option?

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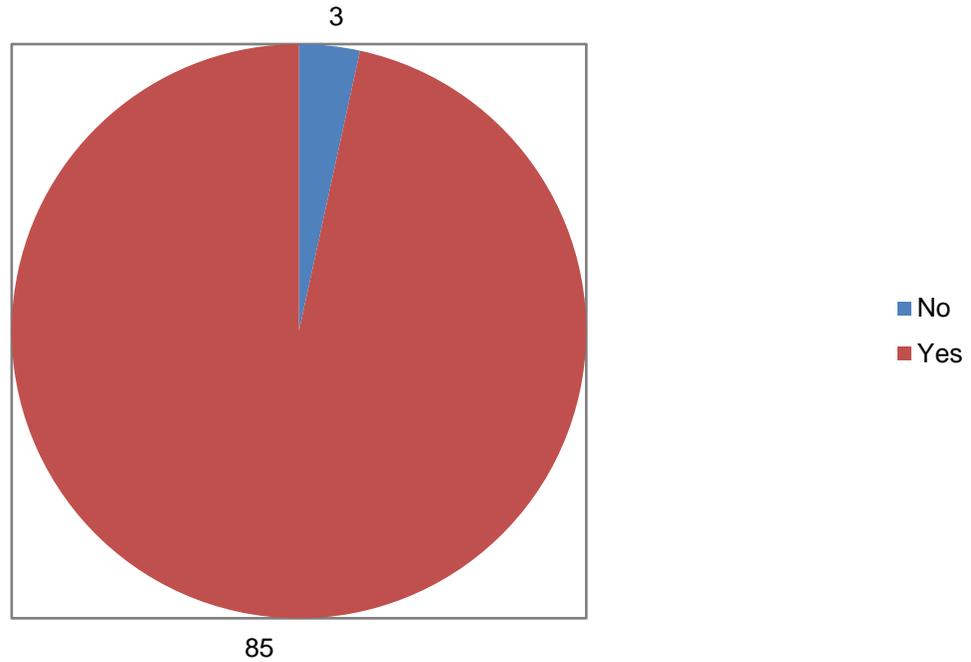


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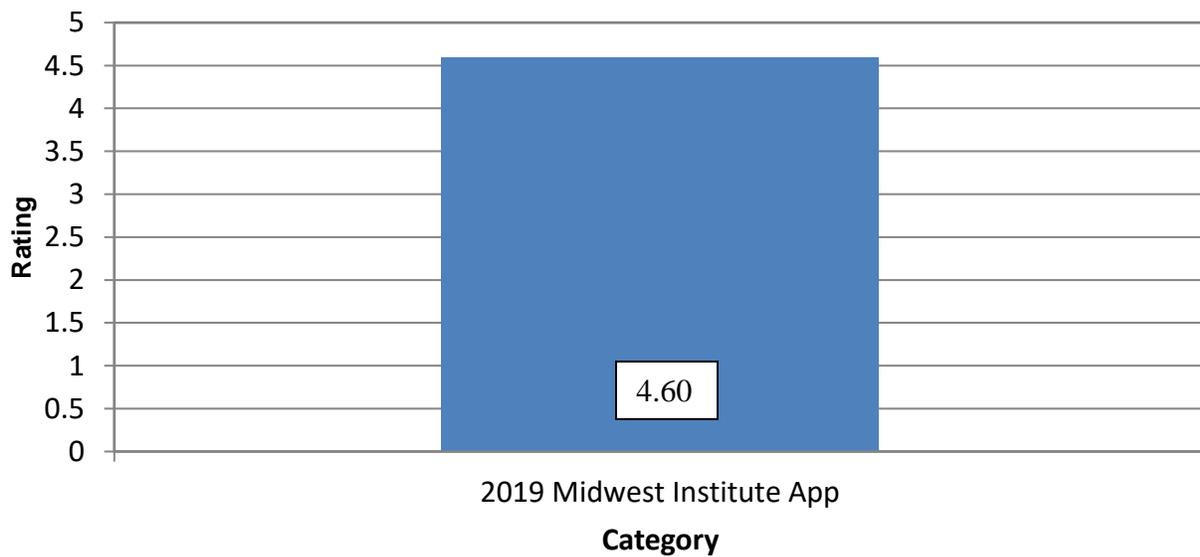
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ATTENDEE SURVEY RESULTS AND FEEDBACK

Did you download the 2019 Midwest Institute App?



Midwest Institute App: If you downloaded the app, how beneficial was the app to you?



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ATTENDEE SURVEY RESULTS AND FEEDBACK

Additional comments about the 2019 Midwest Institute App*:

- Please consider attendee roster sortable by year cohort. I could not find this filter in the app.
- Too dependent on the app. Those who are unable to download the app do not know which rooms to be in, times of events, any updates. Many lost opportunities to participate. A single poster in the hall with the most basic information would have been beneficial.
- The app was very user-friendly, nice to check in and have access to slides with some of the presentations.
- Extremely Effective!
- I found the App extremely helpful.
- Having my schedule and class locations/instructors/PPTs at my fingertips was really helpful; it greatly alleviated the stress of the first day!
- The app was amazing. Easy to use and very helpful. I used it for my schedule, classmates information, speaker information, and handouts.
- As a two-step process, the App was a little clunky. I tried doing it myself, but did not have the IOM course actually loaded until I got to the course and had someone show me how to do it. After that, it was nice to have quick access to the full schedule and my personal schedule. Regarding the course reviews, without having the physical paper in front of me I forgot to complete most of the reviews once the class was over and we got up to leave.
- Love the new app this year!
- I liked having the schedule, access to faculty info, etc. I feel some items are better served hosted on the website, though (E.g., surveys and materials). I likely would have been willing to spend more time on surveys on my laptop than on an app; it's difficult to type out all of my thoughts on a phone.
- This was a great idea. The app was very helpful.
- The app this year was better than the app from last year. Although this app completely drained everyone's phone. I absolutely didn't like the bidding process. It actually put me off from bidding because I didn't like that I needed to put in my credit card information first before even seeing the items to find out what the bid was. I'm wondering if you lost dollars because many people were having trouble with the bidding. I guess I'm old school and like the paper format.
- Using a different app each year was a hassle, and not everyone are app users. Some of us are still "paper" people and would like the option of handouts.
- Quite useful to download course materials and check schedule.
- The app was great! I wish we could share notes with each other, there were times we were all taking pictures and there could be an efficiency there. Maybe even a Dropbox of sorts for us to not duplicate so much.
- I thought it was great and much better than last year. I have to say that again I was a little concerned when we didn't have handouts and such prior to the app but it all worked out great.
- It was nice to have everything in one place, however, I am slow to learn new apps and where to find the answers to my questions. A brief (VERY brief) overview of the app would be nice, or even an email communication with some highlighted features would be helpful.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- It was very helpful but I couldn't find the handouts in there until probably 2 sessions in.
- Much improved over the previous app. The schedule was tremendously helpful.
- See earlier comment. Also, staff adviser should have provided instructions at opening homeroom.
- Although I feel like I floundered with it some, it was helpful to be able to check schedules, class locations and other important information. I used it regularly throughout the week.
- The app was extremely helpful in accessing our class notes, as well as helping remind me of the schedule, classmates, and leaders contact.
- This app had everything you needed in one place. One item I noted was to add the graduation ceremony location to the map. . .but otherwise it was very useful.
- I liked the app although I could not get the desktop version which meant that I had to email myself all the attachments from the app. It wasn't hard so it didn't seem like that big of a deal. It would be awesome if there was a software that could hold all our schedule stuff plus the auction.
- Please choose one app and stick with it.
- Over the past few years there has been a lack of continuity with the apps used. Would be great to stay with the same one if possible. Really liked that the slides were added to the classes this year - very helpful! This app was my favorite of the previous ones used.
- I didn't download, but I did use it on my web browser on phone. It was okay. It would be nice if the master schedule could be in the planner book (but realize that probably cannot happen).
- Didn't really care the apps changed but there was a lot of talk in the classes that people did not like that there wasn't consistency.
- Loved the name/face recognition. Also appreciated all the professors information.
- The app was super helpful and I was really pleased that I could switch classes when I wanted/needed to.
- It was beneficial to view my schedule but hosting the class materials solely on the app was worthless during the event. I need handouts PRIOR to the event. I didn't bring a computer and I take notes with a pen like an old man.
- Although I relied on the desktop version to download materials, I think I interacted with the app for all scheduling and location. I used it. It worked. I would continue to include it for folks as an option.
- Kudos on the app! It was an excellent tool!



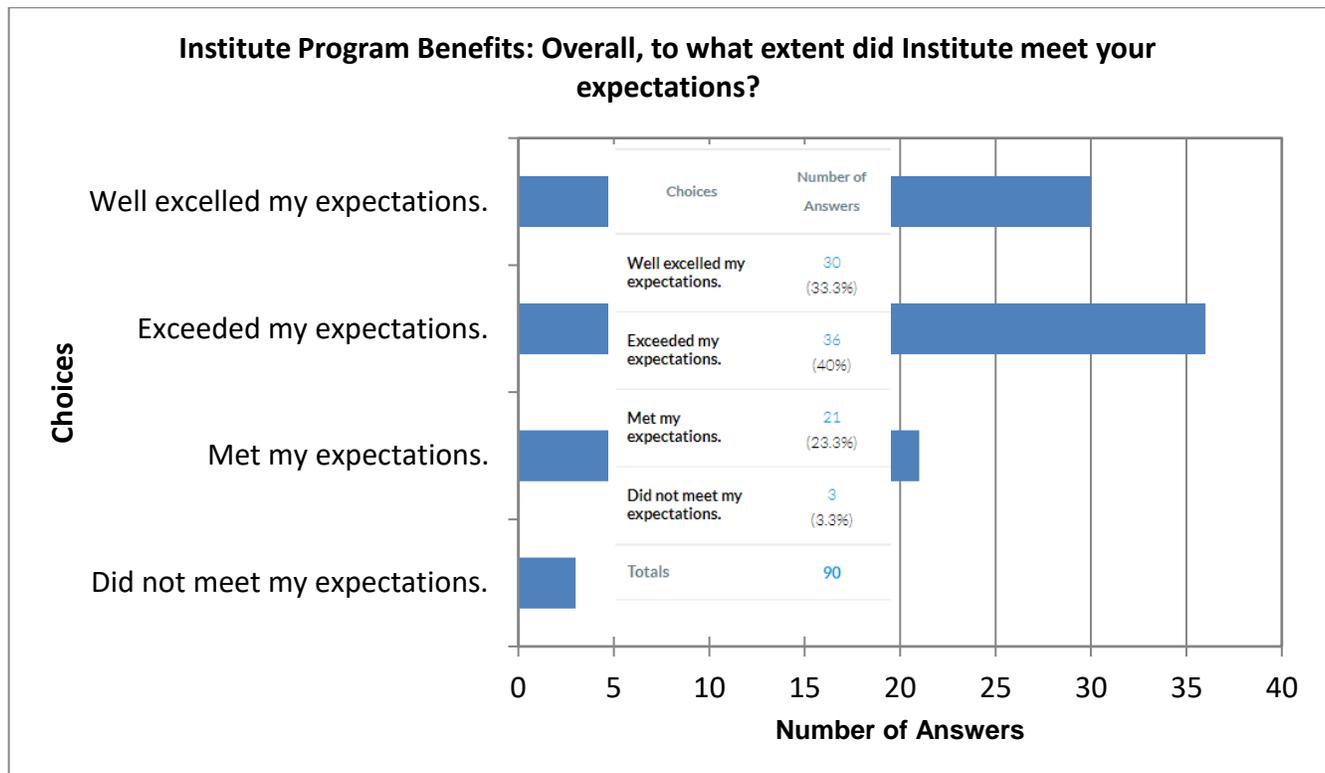
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ATTENDEE SURVEY RESULTS AND FEEDBACK

Institute Program Benefits : Rate to what degree you agree with the following statements.

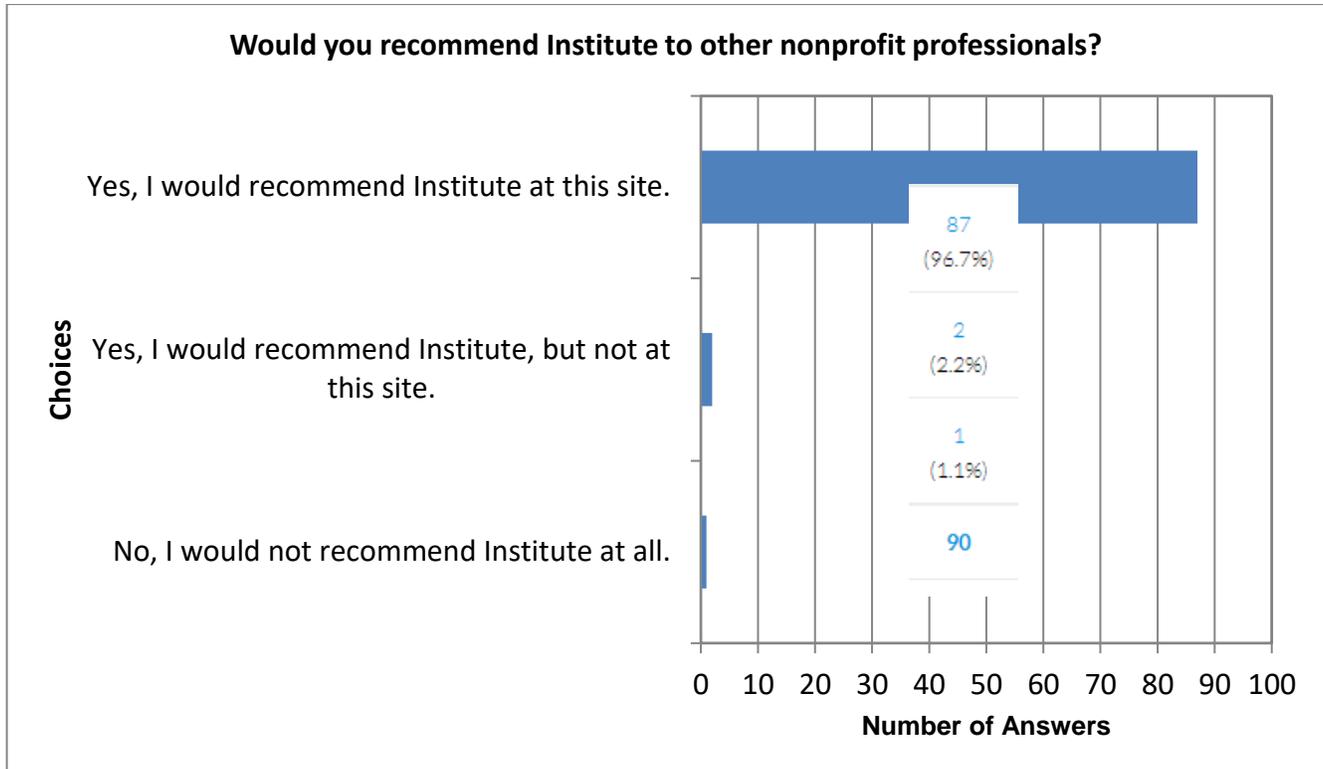
Answer Category	Choices					Totals
	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	
The Institute curriculum provided valuable professional development.	0 (0%)	2 (2.2%)	3 (3.3%)	41 (45.6%)	44 (48.9%)	90
The Institute courses were conducted at a suitably challenging level for me.	0 (0%)	10 (11.1%)	11 (12.2%)	43 (47.8%)	26 (28.9%)	90
Institute provides a good networking opportunity in nonprofit management.	0 (0%)	0 (0%)	3 (3.3%)	32 (35.6%)	55 (61.1%)	90
Totals	0	12	17	116	125	270



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ATTENDEE SURVEY RESULTS AND FEEDBACK



Additional general comments about the 2019 Midwest Institute*:

- Great people and connections made. I found many of my courses interesting, but found a few instructors less professional or engaging than I'd hoped (reflected in my surveys). I would LOVE a programmed time to discuss hot topics and solutions with my industry peers; I feel like that is an untapped resources that is missing in programmed time. While the less programmed networking helps with that, it's much more difficult for engagement on specific topics in a round-table setting. This year was significantly more beneficial for me than last, and I look forward to next year.
- I would recommend fewer slides and more conversation - interactive opportunities during class.
- I feel the breaks are a tad longer than needed. Maybe just 15 minutes and let our lunch be an hour and a half?
- I wish we could keep the class advisor with us as we move up in years. We had a fantastic time with [removed]! I already miss my whole class, and can't wait to come back next year.
- I was informed that IOM used to include testing. I think that even if the testing was straightforward, and the courses "taught to the test", I would feel like I came away with more concrete information. Right now, I've been told that I probably have most of the information that would appear on the CAE exam, but I really am not convinced. To be more useful, the IOM courses should be taught as preparatory for the CCE/CAE exams, with some easy testing at the end so attendees have more confidence in the information that was provided and their mastery of that information.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- I liked the format and layout of the days. It was good to have the longer days in the beginning and the shorter day at the end.
- Year 2 instructors did a MUCH better job applying content and discussion to BOTH associations and chambers. Year 1 was extremely Chamber focused and I was thrilled to have this year's discussion more focused on associations and chambers. That said, the advocacy session made no effort or attempt to try and apply discussion toward associations.
- I think that the curriculum is excellent in terms of the content covered. For the most part, the instructors are outstanding, or at the least, very good at presenting the material. For me, the majority of presentations this year were more didactic than I usually prefer. More interaction and back and forth, versus lecture-dominated sessions would be great. I note, however, that this feedback is subjective and representative of my personal preference; I prefer more back and forth discussion. [Removed] is a standout presenter who encompasses the best of both worlds: a skilled lecturer who mixes it up with back and forth interaction with the class and small group work.
- Have also been to Tucson, by far preferred Madison - the facility, the size, the people overall - entire event felt more "professional" and less about a party.
- The staff and volunteer leadership are amazing here! They truly are a model on how an organization should work! I have referred one person who is attending currently, I have three others I am trying to get to attend!
- Overall WONDERFUL experience for me, my entire visit was with ease although being relocated for my Hotel stay, no biggie. Doubletree was proactive in reaching out. I would highly recommend this site, Madison is a great city and very walkable.
- I enjoyed the IOM experience. It was great leadership development. As an experienced association professional I did find it too heavy on chambers but that also reflects the composition of participants which was overwhelmingly chamber in each of my four classes (I fast tracked so was with a different class each year).
- Placing the Finance class on the last day of institute, I believe, is misplaced. After a week of classes, attention on that very important topic can wane. Everything we do in our work is built on the premise of a strong financial position.
- I would have liked to have a little more time for lunch. One hour was tight. It did not leave a lot of time for networking, or even just enjoying the outdoor weather a little longer. I wonder if you could shorten the breaks to 20 minutes and tack a little extra onto the lunch hour?
- I think the cost of tuition justifies a more intensive training experience, perhaps bringing back testing to qualify for graduation.
- It was great to see my class again! I wish there was more time for inter-class networking - maybe during the lunches. I only have a few associations in my class so it would be nice to meet other association executives.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Thank you for better temperature management. It wasn't freezing like it normally is, so thank you. As I mentioned in one of the other survey questions, I think the bidding process was horrible. I didn't do it because I shouldn't have to put in my credit card number to look at items. A lot of other guests were complaining about that as well. Also, there was a lot of miscommunication between what was told to advisors/regents and what was on the app. Sometimes phone numbers and text were incorrect. Times for event was incorrect. I also felt that this year's core classes were a little light. Meaning, they could have been in the first year's class. I was expecting a little more management difficulty. But I still love coming!
- Most of my classes were amazing however, there were two classes that I thought were either a repeat or maybe even a 1st year course. I love [removed] but his Everyday Ethics was exactly the same information he gave us last year. Same stories, same info, same everything. I have ZERO notes from his course because I took them all last year. There were several of use that thought the exact same thing. Another class that I felt should have been an elective is Win Win Partnerships. There was nothing I took away from that class. I also have no note on this class, as I felt there was nothing I needed to write down. What was most disappointing about these two classes is that they were core classes and very long core classes. Give me more [removed]. Best class of the entire week was hands down, Strategic Planning by [removed]!! Overall, great job to the board, staff and advisors!
- I expected to leave Institute feeling overwhelmed but I honestly left feeling empowered and ready to take my Chamber to the next level. I attended for the first time after being in the industry 5 years so I came in with a decent amount of knowledge however I still gleaned so much new information that I know, when put in to action, is going to transform my Chamber, my professional life and my way of leading our organization.
- It is an intensive, overwhelming (in a good way) 4 days of learning and bonding. I am grateful for the opportunity to continue my education in non-profit management there. Madison is an incredible location for the conference. I will be back! Please pass along to the college their team did a fantastic job as well! Thank you!
- There may be too many differences between Associations and Chambers to continue with a combined Institute. There were classes where Associations were completely omitted from the curriculum and entire conversations did not apply.
- I would say start the mornings off at 8:30 am; the 30 minute breaks are too long; go down to 15-minute breaks and a 45 minute boxed lunch. I would also like to see break out sessions during the lunch hours based on Chamber sizes/association and within those, we can discuss issues/ideas unique to them. The final day could start off at 9 am with a 15-minute break and conclude at 12:30; would be nice to start an hour later.
- It is exceptionally disappointing when you have presenters that present the exact same material and stories as they did in previous years. Additionally when presenters are not prepared. I had a combined total of one full day wasted on these presenters. This is the exact thing that happened in my second year. I feel that I should receive my 4th year free due to my second and third year experiences.
- Thank you for listening!

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Give a little more time at lunch and less at breaktimes? Felt rushed at lunch after waiting in longer lines. Shorten the 3 to 3.5 hr classes to maximum of 2 hrs and include more electives.
- Institute is a great asset to someone that is looking to enhance their impact in nonprofit leadership roles. There are also an immense amount of networking opportunities that are available through Institute.
- This has been an amazing experience for me. I am so grateful to be able to attend and learn so much that will benefit our industry.
- The lunch breaks were incredibly too short. There should be a 20 minute transition time pre- and post- the hour designated for lunch.
- As this was year three, some of the courses could have been a bit higher level. I find that real world, take home, practical resources are best. Things you can actually implement when returning to the office. Each course had small nuggets of information that I could use but overall I found some of them to be at a lower level.
- Thanks to the entire IOM staff and volunteers for an excellent 4 years of professional development training in Madison.
- I was really pleasantly surprised with how much I took away from Institute. Overall I would really love (selfishly) to see corporate responsibility incorporated in the curriculum and a more advanced fundraising strategy conversation.
- The faculty were excellent. [Removed] could teach for a full day and I would be happy! As far as the mechanics of the program, I would suggest shortening the break times and adding onto the lunch time, esp given the walk and the lines that occurred during lunch. We were very rushed and did not have the time to decompress and network as we would have liked.
- More communication about class materials, less about where we're having dinner and t-shirts. Otherwise a well run event.
- I might take a look at the length of some of the classes. Some classes I felt were too long based on the content and others I thought could definitely be longer based on content. I am sure it is a balancing act and not sure how long it has been since these have been revised. Just a suggestion if they haven't been looked at in awhile. Suggestion: 1st class on Sunday instead of the last class on Thursday. We have to be there for registration, home room & kick off. How about the 1st class be right after that? Maybe just for 4th Years so that the other three years do not try and leave before the Big Bash. Just some thoughts.
- I have stated each year that I think this program could benefit from new instructors. When most of your instructors start by saying they have been teaching the same course for 20 years it is quite a turn off...especially when it comes to topics that have changed greatly over the past 20 years. I believe that bringing in a more fresh, more diverse group of teachers and topics would attract more students and a stronger involvement from participants.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- I would recommend Institute at ANY site. It is a great way to make friends nationwide that are in a similar field to you. The greatest benefit of Institute is the network of peers. However, the courses were sub-par. By 3rd year, we all know the basics of our job. We should go into more detail on each subject. For example: The Budgeting class was useless. We should all know how to budget by now. It would have been great to dive deeper into the budget and look into examining our expenses, or auditing ourselves or building a forecast for the next 5 years. Another example: The ethics class that we took could have been wrapped up in 15 minutes. However, let's actually discuss ethical issues we face such as sponsorship fulfillment and favoring members or staff. It would have been nice to learn how to audit our staff and volunteers for ethical behavior as well.
- Add a kickoff attendee engagement. Reduce the breaks to 15 minutes. Host a lunch session (box lunch) for Best Practices)Host a lunch session (box lunch) for Chamber clusters by size and Associations with a survey to capture critical topics prior. Start the sessions at 8:30 - several things to tackle in the mornings (catch up with family, work, workout, breakfast and walk to class) Start Thursday at 9:00 (ending at noon)Thank you for all your dedication and time in hosting. Overall it was well worth time and money with walking away with excellent implementation strategies and ideas, new perspectives and new friendships.
- Per earlier comment, the Board needs to understand their role as related to integrating with students at breaks, lunch, etc. It's ok for them to sit at lunch tables with non-Board members and meet new people. Put themselves in the same situations as their members at events.....This is a premier professional development program. Thank you for the hard work that goes into making this happen across the country and for challenging all of us to get better.
- I think the courses are all great, but as an association professional, I struggle sometimes with core classes that are chamber focused (think Government Relations class). While my organization has a program, it is not the same as a chamber nor will I ever be involved, so this was a challenge for me to engage during this 3 hour class. The speakers also seemed much better this year- more engaging, more humor- KEEP IT UP! Lastly, I like that we have open evenings to make what plans we want as many of us in class like to go unwind after long day of education and have some fun, so that is helpful, thanks!"
- Being my second year, I felt like I really began to know my class (as we were split last year). We had some new people join us and they fit right in. I have gained a wealth of knowledge that I can definitely use in my Chamber. It is also very interesting to me the work of associations. I am learning and that is what I signed up for. Thank you for the scholarship and the opportunity.
- Some classes at Institute (anything taught by [removed], budgets, governance, etc.) are knock outs. Others are just boring and not applicable/too basic/basicly group think. I appreciate classes that make me think, have clear and actionable take-aways and challenge my thinking. I really love those classes and those are what keep me coming back. I wish they were all that way.
- Unfortunately there was a lot of repeat from previous years. Having the same instructors year after year for multiple courses limits the viewpoint and the content. Event though I took different classes then I've taken in the past, much of the information was a repeat - right down to the examples and handouts. In addition, many of the speakers continue to hold an old school version of what a Chamber is. It would be outstanding to get some more progressive speakers in that can challenge us to develop into a strong Chamber for the future!

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- It would be extremely beneficial to break up the classes by organization size, or at least offer electives based on org size. As one of the largest chambers, my challenges are much different than smaller organizations (we don't have more or fewer challenges, just different). Because the majority of my cohort came from small organizations, the information wasn't as useful. Also, I'd love to see more time for exchanging ideas and problem solving together as a cohort, rather than stiff presentations with little time to interact. A roundtable where people bring their biggest issues and share with a group for feedback would be great. Each roundtable could be themed around fundraising, HR, member benefits, events, finance, government relations, communications, etc.
- Another great year! I would like an advanced class with a topic related to teamwork and how to do this well in the office and community. Different models related to teamwork environments. Another topic on; networking, collaboration, partnering and coalitions/alliances. The difference, how to do each well. I was very impressed with the diversity, equity and inclusion course.
- Thank you to the Board of Regents, Institute staff and Class Advisors for the time and effort it takes to offer this program every year. The program is outstanding and I cannot say enough about the value of the courses and the networking.
- Monday goes too long. Since we have to be there on Sunday, couldn't we squeeze a quick two hour class in to reduce the length of time we spend in class on Monday?
- Overall a great program. The education, networking, and relationships created during this 4 year program only enhance us as professionals.
- I loved my experience with IOM! I would recommend this program to anyone who is interested. The connections with class advisors, industry professionals, and professors was outstanding, I feel I can call them and ask for help anytime.

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



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

2019 BOARD OF REGENTS

CHAIR

Christine Kennedy, IOM, CCE, CPC, ELI-MP
COO and Executive Vice President
Lynchburg Regional Business Alliance
300 Lucado Place
Lynchburg, VA 24504
434-845-5968
ckennedy@lynchburgregion.org
Term: 2018-2019

PAST CHAIR

Bryan Daniels, IOM, CCE, CEcD
President and CEO
Blount Partnership
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Maryville, TN 37804
865-983-2241
bdaniels@blountpartnership.com
Term: 2018-2019

Rita Berry, IOM, CCEC

President and CEO
Greater Summerville/Dorchester County
Chamber of Commerce
402 North Main Street
Summerville, SC 29483
843-873-2931
rberry@greatersummerville.org
Term: 2014-2020

Henry Florsheim, IOM

President and CEO
Wichita Falls Chamber of Commerce
900 8th Street, Suite 218
Wichita Falls, TX 76301
940-723-2741
henry@wichitafallschamber.com
Term: 2016-2020

VICE CHAIR

Teri H. Smiley, IOM, GCCE
President
Walton County Chamber of Commerce
132 East Spring Street
Monroe, GA 30655
770-267-6594
teri@waltonchamber.org
Term: 2018-2019

Skip Alford, IOM, FCCP

President and CEO
Greater Palm Harbor Chamber of Commerce
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Palm Harbor, FL 34683
727-784-4287
skip@palmharborcc.org
Term: 2017-2019

Elisabeth Deville, IOM

Executive Vice President
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337-433-3632
ldeville@allianceswla.org
Term: 2016-2020

Elizabeth Horton, IOM

Senior Vice President of Operations
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24 Cleveland Street
Greenville, SC 29601
864-239-3723
lhorton@greenvillechamber.org
Term: 2013-2019



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

2019 BOARD OF REGENTS

Pammie Jimmar, IOM

Vice President, Small Business and Events
Huntsville-Madison County Chamber
225 Church Street
Huntsville, AL 35801
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pjimmar@hsvchamber.org
Term: 2016-2020

Michelle Kiely, IOM

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Make-A-Wish East Tennessee
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Chattanooga, TN 37416
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michelle814@me.com
Term: 2017-2019

Beth Morrison, IOM

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

Rick Roden, IOM

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Greater Jackson County Chamber of Commerce
PO Box 973
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Term: 2015-2019

Heath Taylor, IOM

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Dublin-Laurens Chamber of Commerce
116 Cedar Creek Drive
Dublin, GA 31021
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Term: 2018-2020

Carlton Tidwell, IOM, CEcD

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Terrell Chamber of Commerce
PO Box 97
Terrell, TX 75160
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Term: 2017-2019

Ray Villegas, IOM

352-223-2952
raymundvillegas@yahoo.com
Term: 2015-2019

Allison B. Walden, IOM, CFRE

Senior Vice President of Resource Development
Tulsa Regional Chamber
One West Third Street, Suite 100
Tulsa, OK 74103
918-560-0271
allisonwalden@tulsachamber.com
Term: 2016-2020



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

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2019 BOARD OF REGENTS

Scott Waller, IOM
President and CEO
Mississippi Economic Council
PO Box 23276
Jackson, MS 39225
601-969-0022
swaller@mec.ms
Term: 2013-2019



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

AGENDA

OCTOBER 4, 2019

10:15 A.M. – 12:00 P.M. EDT

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

- I. **Welcome and Introductions** Christine Kennedy, IOM, CCE, CPC, ELI-MP
- II. **Approval of Minutes** Christine Kennedy, IOM, CCE, CPC, ELI-MP
- III. **Institute Staff Update** Institute Staff
 - A. Program Updates and Looking Ahead
- IV. **Nominating Committee Report** Teri Smiley, IOM, GCCE
- V. **Analysis of 2019 Southeast Institute** Board Members/Institute Staff
 - A. Final Enrollment Report
 - B. Survey Results and Discussion of Institute Week
- VI. **2020 Southeast Institute** Teri Smiley, IOM, GCCE
 - A. Create 2-3 Strategic Goals
 - B. Discussion of Week/Assign Regent Responsibilities
- VII. **Other Business/Adjournment** Christine Kennedy, IOM, CCE, CPC, ELI-MP

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



MINUTES

JUNE 23, 2019

11:30 A.M. EDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

In attendance: Christine Kennedy, IOM, CCE, CPC, ELI-MP; Teri H. Smiley, IOM, GCCE; Bryan Daniels, IOM, CCE, CEcD; Skip Alford, IOM, FCCP; Rita Berry, IOM, CCEC; Liz Deville, IOM; Henry Florsheim, IOM; Liz Horton, IOM; Pammie Jimmar, IOM; Michelle Kiely, IOM; Beth Morrison, IOM; Rick Roden, IOM; Heath Taylor, IOM; Carlton Tidwell, IOM, CEcD; Ray Villegas, IOM; Allison Walden, IOM, CFRE; Scott Waller, IOM; Vanessa Bennett, IOM; Theresa Byers, IOM; Paige Green, IOM; Shelley Loe, IOM; Jonathan Packer, IOM; Beth Rhinehart, IOM; Cory Skeates, IOM, FCCP, J.D.; Judd Wilson, IOM; Karyn K. MacRae, IOM, CAE, CMP; Mandy Pan

I. Welcome and Introductions

Christine Kennedy, IOM, CCE, CPC, ELI-MP welcomed everyone to the meeting and introductions were made.

II. Staff Updates and Week Overview

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

III. Photos and Joint Lunch

A group photo was taken and participants caught up over lunch.

IV. Class Advisor Responsibilities

Specific Class Advisor responsibilities were discussed in detail. The first Class Advisor Broadcast was reviewed with the group and questions were answered. The role of the Regent Partner was also reviewed.

V. Other Business and Class Advisor Adjournment

Additional Class Advisor business was discussed prior to advisors being dismissed.

VI. Board of Regents Business

- Approval of minutes
 - The minutes from the May 7, 2019 conference call were approved with no changes.
- On-site regent responsibilities
 - Regent roles and expectations during the Institute week were explained. This included, but was not limited to: information on when to arrive downstairs every day; how they should network with attendees during meals and social functions; after-hours interaction with attendees; what to do while attendees are in class, etc.



SOUTHEAST

MINUTES

JUNE 23, 2019

11:30 A.M. EDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

- Visiting Homeroom
 - Regents discussed the possibility of visiting each Homeroom.
- Importance of fundraising
 - The group was reminded of the various ways to fundraise and that all funds raised on-site go to Institute scholarships.
- Additional business and adjournment
 - Any remaining business was discussed prior to adjourning the meeting.

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



SOUTHEAST

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

2020 SCHEDULE OF ACTIVITIES

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

Sunday, June 28

11:30 a.m.–1:30 p.m.
2:30 p.m.–4:00 p.m.
3:30 p.m.–4:00 p.m.
4:00 p.m.–4:45 p.m.
5:00 p.m.–5:30 p.m.
5:30 p.m.–7:30 p.m.

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

**This event is sponsored by the Georgia Chamber of Commerce, Athens Area Chamber of Commerce, and PSP Group, and is not an official Institute function.*

Monday, June 29

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

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

Tuesday, June 30

8:00 a.m.–10:00 a.m.
10:30 a.m.–12:30 p.m.
11:00 a.m.–11:30 a.m.
12:30 p.m.–1:30 p.m.
1:30 p.m.–5:00 p.m.
2:00 p.m.–2:30 p.m.
5:15 p.m.–6:00 p.m.

Elective Classes: UGA Hotel, Individual Classrooms (*Break: 10:00–10:30 a.m.*)
Elective Classes: UGA Hotel, Individual Classrooms
Board of Regents Meeting: Faculty/Regent Lounge, UGA Hotel, Room C
Lunch: UGA Hotel, Magnolia Ballroom
Core Classes: UGA Hotel, Individual Classrooms (*Break: 3:00–3:30 p.m.*)
Class Advisor Meeting: Faculty/Regent Lounge, UGA Hotel, Room C
45 Ideas in 45 Minutes: UGA Hotel, Masters Hall

Wednesday, July 1

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

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

Thursday, July 2

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

Core Classes: UGA Hotel, Individual Classrooms (*Break: 9:30–10:00 a.m.*)
Class Advisor Meeting: Faculty/Regent Lounge, UGA Hotel, Room C
Board of Regents Meeting: Faculty/Regent Lounge, UGA Hotel, Room C
2020 Southeast Institute Concludes



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2020 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

Class Advisors

Pammie Jimmar

Silent Auction/Fundraising

1. _____

2. _____

3. _____

4. _____

Industry Consultations

1. _____

2. _____

Scholarships

1. _____

2. _____

3. _____

Opening Welcome

1. _____

2. _____

3. _____

Graduation Ceremony and Big Bash

1. _____

2. _____

3. _____

State Photos

1. _____

2. _____

Tuesday Afternoon Bonus Session

1. _____

2. _____

Volunteer/Faculty/Staff Dinner

1. _____

Association Specific Event (Optional)

1. _____

2. _____

Ambassador Program (Optional)

1. _____

2. _____

3. _____

Social Media Strategy (Optional)

1. _____

2. _____



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

GEOGRAPHIC BREAKDOWN

2019 Southeast Institute

238 Attendees from 23 states and the District of Columbia

State, Number of Attendees, %

Alabama	24,	10.08%	Minnesota	1,	0.42%
Arkansas	4,	1.68%	Mississippi	20,	8.37%
Colorado	1,	0.42%	Missouri	1,	0.42%
District of Columbia	4,	1.68%	North Carolina	23,	9.62%
Florida	22,	9.24%	Ohio	4,	1.67%
Georgia	36,	15.13%	Oklahoma	3,	1.26%
Indiana	1,	0.42%	South Carolina	20,	8.37%
Kansas	4,	1.68%	South Dakota	1,	0.42%
Kentucky	13,	5.46%	Tennessee	23,	9.62%
Louisiana	9,	3.78%	Texas	13,	5.44%
Maryland	1,	0.42%	Virginia	5,	2.09%
Massachusetts	2,	0.84%	West Virginia	3,	1.26%

Top Increases since 2018:

Alabama +4

Louisiana +4

Most attendees in 2018, Georgia with 36

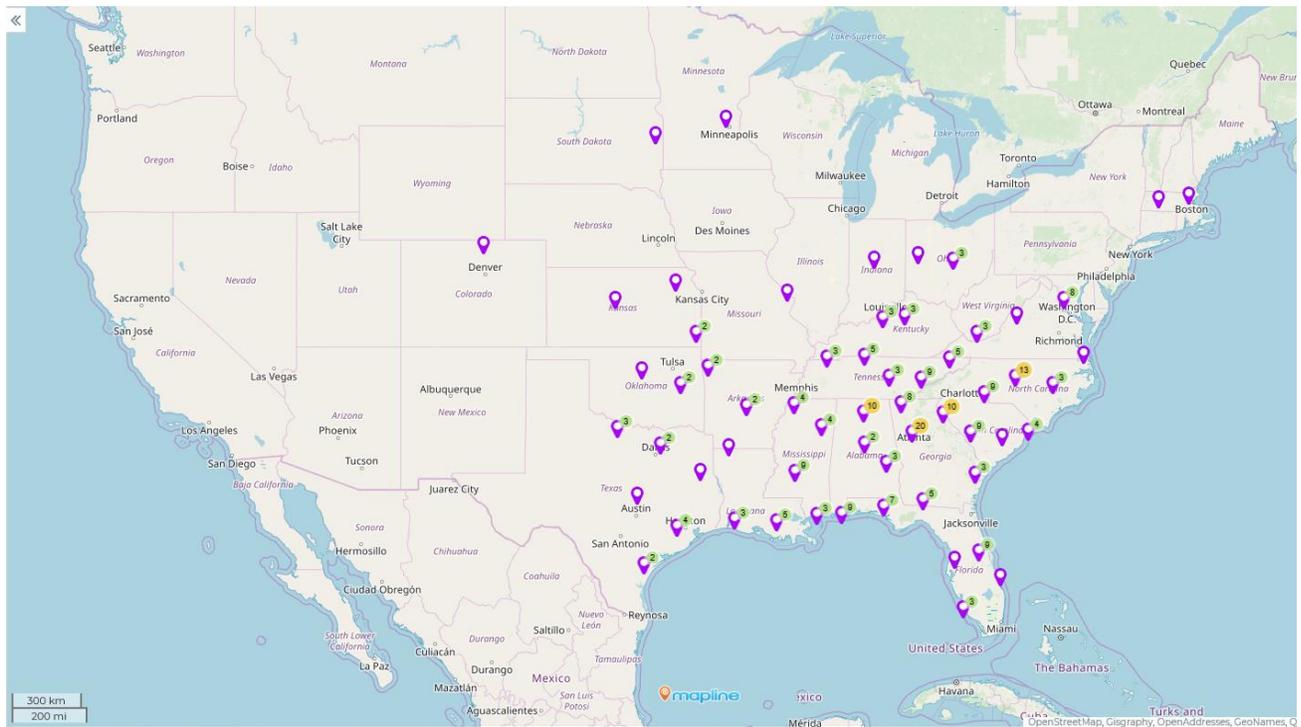
Most attendees in 2019, Georgia with 36



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

GEOGRAPHIC BREAKDOWN

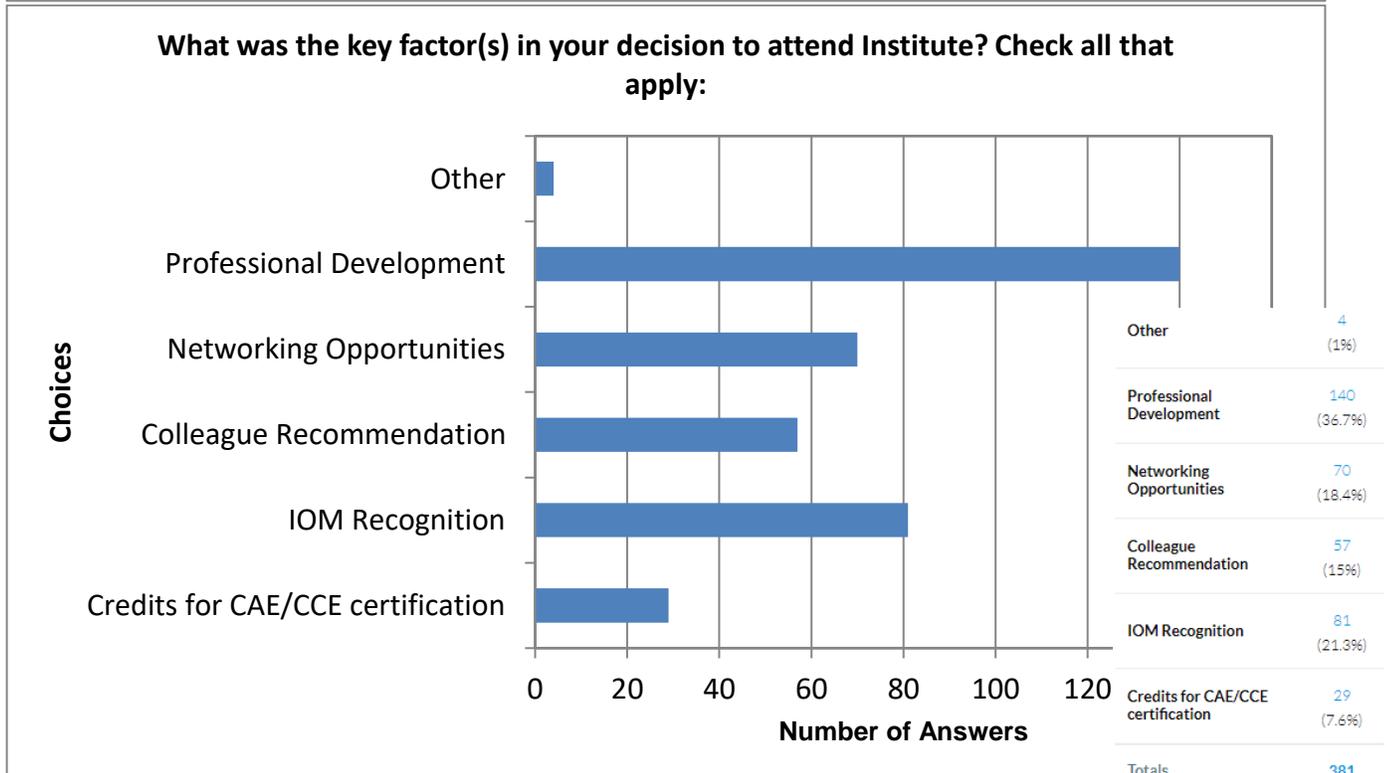
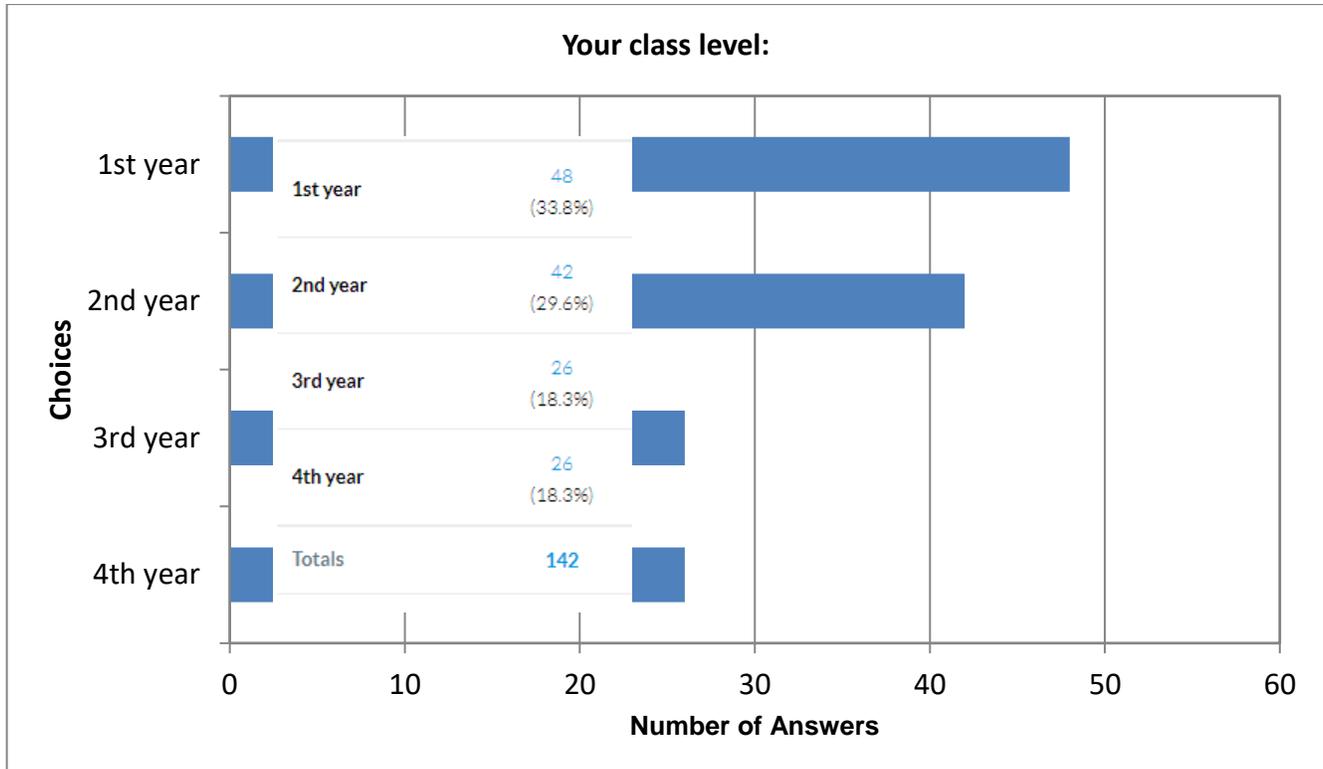




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Institute for Organization Management

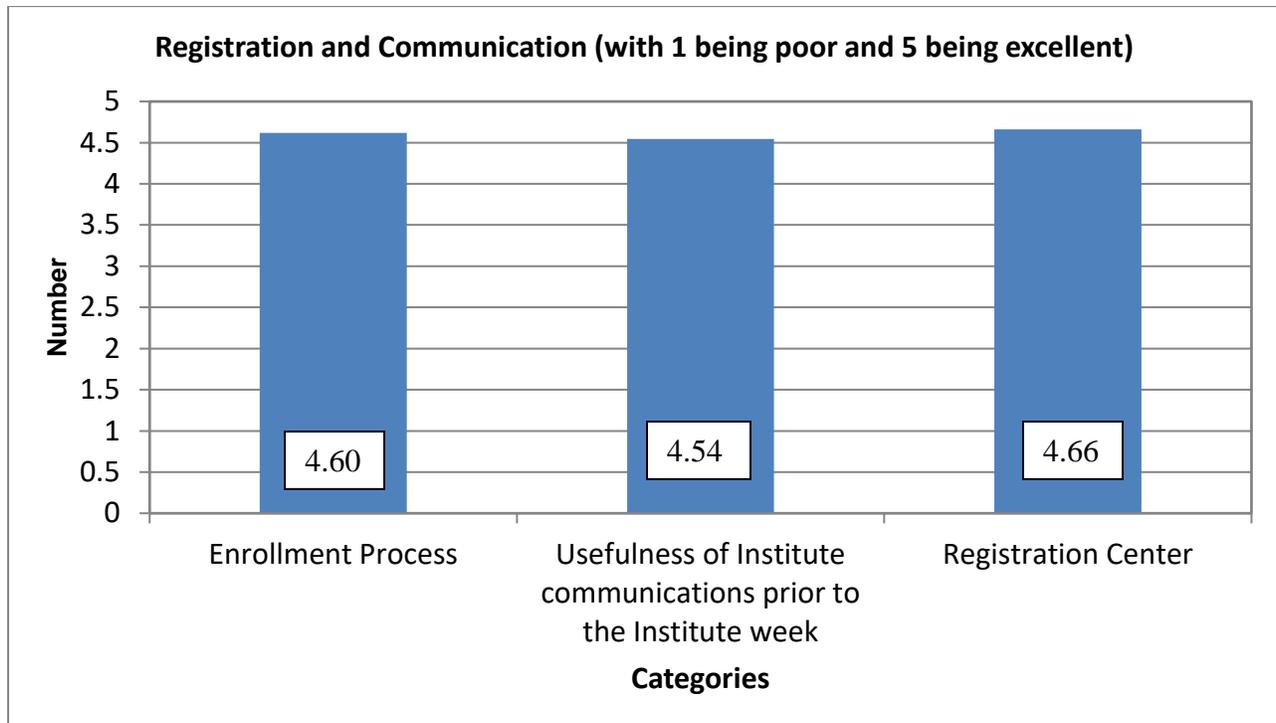
ATTENDEE SURVEY RESULTS AND FEEDBACK



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



ATTENDEE SURVEY RESULTS AND FEEDBACK



Additional comments about registration and communication*:

- Everything was easy to do. I had no problem with the process or communication.
- The only issue I had was the fact I registered as soon as registration was live and then attempted to apply for a scholarship and found out during the scholarship application completion that I couldn't earn a scholarship if I had already registered. That communication seemed backwards with the process and I was disappointed to find I couldn't earn the scholarship especially because our chamber was sending two people this year.
- Some of the communications were not timely. For example, the email regarding the reception hosted by the Athens Chamber. Our class had planned a function for that evening and signed a contract prior to receiving the communication. I also heard from several attendees that they did not receive the email about the reception.
- Leading up to Institute - I love the communications, but receiving emails in a group and each person responding interferes with work flow and having to respond to each email. Maybe only the class advisor can send out emails.
- Registration was easy and the communication throughout the process was excellent. The app kept everything easy to navigate. There was no wondering of where you should be and at the designated time. All details were kept updated and was very user friendly.
- This was super easy and I felt very welcomed when I arrived at Institute!

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- I would prefer a little more lead time on my class materials and direction regarding whether or not it is recommended to print them in advance or just look over them. In a few of my classes, I had printed the materials but then new copies were dispersed by the instructors. It's not a big issue by any means, but it is one improvement I could see.
- The app was very useful once it was downloaded, however info about how to download came only once and late in the process. Meanwhile, registration information was somewhat difficult to find after registration was complete.
- Easiest Registration Ever!
- Many others in my class along with myself found that the changes this year with the third party company for registration was very difficult and not clearly communicated prior to registering.
- My only complaint is that somehow even though my co-worker and I were registered, our class adviser did not have us on her list. So we missed a lot of key communication - such as ordering class tshirts - that took place prior to our arrival at Institute. That was a little disappointing that we were left out of the loop. The communication from Institute itself was fine. Somehow our info just wasn't communicated properly to our adviser.
- Registration was a bit lengthy but efficient.
- My chamber has to save and budget for me to attend institute and every discount would have made a huge difference. I was not notified until late on Good Friday about my scholarship - I received the email after we closed (after 5pm) so I missed the early bird deadline to register. I very much appreciated the scholarship but the additional savings would have made a huge difference for us.
- Would be helpful to access an online transcript so we can remember what electives we've already taken.
- Registration was easy but there was little communication that everything was on the app.
- Lots of confusion in our Coastal Alabama group. Many of us did not receive any communication at all. Thankfully our college mentioned an email so we finally made a few calls and got it all straightened out. No one knew why?
- Very smooth communication and great process.
- Great communication prior via email. I was able to add the app on my phone before coming to Athens and able to see my schedule as well as make any modifications. I really enjoyed the use of the app!
- I need to be more careful with the online registration and make sure I'm applying all tuition discounts available.
- The only problem I had was that I received my scholarship code late and was not able to apply that to my tuition.
- Thankful for the wonderful communication from our class advisor who hosted conference calls prior to attending.
- I wish the program would tell us if we've already taken an elective. A few classmates had issues with that.
- [Removed] was there waiting with a smile and welcome me to Institute again, she make the third year a great year for me.

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



SOUTHEAST

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- My admin handled the registration for me; it was seamless except somehow her email address was listed as mine and all correspondence prior to institute went to her. We both attempted to change it, but were unsuccessful - she continues to receive my Institute correspondence (including this survey).
- As a first year, I did not fully understand how to pick electives and how they fit into the overall schedule. More details on the front end would have made it less confusing.
- We had an excellent class adviser, [name removed] for my first year who scheduled three conference calls all prior to IOM. I am not sure if this happens for every class but it was very valuable for me.



Additional comments about customer service*:

- We had [removed] as our class advisor this year. He was fantastic!
- Very loud in the mornings when first going to class. Board of Regents introduced themselves too often - during class and first night. Introductions were too long.
- Everyone was so nice and accommodating. I enjoyed the Board of Regents welcoming us each morning with music. Keep it up!
- The Board of Regents and class advisors at Southeast are the absolute best!!
- We had a great Class Advisor! [Removed] was engaging, positive and a great leader!

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Top notch!
- I would like to take the opportunity to give the highest praise to our class advisor, [name removed]. Not only was she a great leader, but she went above and beyond for our class. She contacted us no less than three times prior to IOM to make sure we had all questions answered. She asked questions to get to know us, provided our favorite snacks, and even left us with a parting gift of a picture of our class together. We could not have gotten a better gift from Institute than the friend and mentor we have in Paige. I know it's not a thing to keep the same advisor each year- but if you'd like to make it a thing, I know class 1-2 would be ever so grateful!
- Little things like getting a heads up to print the course materials beforehand would have been helpful. Some folks knew to do that and several folks did not. I think that some things are assumed that we will know to do. I downloaded the app and looked it over but didn't dive into the individual courses to see that there were things to print.
- I thought the Board of Regents was very visible and really tried to be seen and connect. It was appreciated.
- My class advisor, [removed] was awesome! The board was very enthusiastic.
- My advisor, [removed], was the absolute best! He was encouraging, answered any questions we had and helped to make my second year a great one! I wish we could have him again for Year 3 and Year 4!
- [Removed] was our class advisor and was incredible! He went above and beyond for our class and made the experience even better.
- IOM staff was outstanding and very helpful...UGA Conference Center staff were extremely nice but just did not seem to be trained and able to provide answers.
- Our Class Advisor was great and really so was everyone else. It was a very motivating experience to have such wonderful people ready to assist you with just about anything.
- I had very little interaction if any at all with the Institute staff. I wouldn't be able to point them out in a crowd. The hotel staff was very easy to deal with but I had very little interaction with them. Our class Advisor was AWESOME. She did a great job and I look forward to seeing her again. The board of Regents was AMAZING!! Every morning they greeted us with smiles and high energy music that made the morning easier to get through. Each of them always wore a chamber smile and that was great to see each day.
- Everyone was great at Institute! I did not come in contact with anyone who was not willing to help in any way they could!
- The dinner at the Big Bash left a lot to be desired. Food was not good, and the staff seemed indifferent.
- Great staff, awesome accommodations at UGA, class advisor was very informative. Great service with assistance from Board of Regents.
- My class advisor, [removed] made my first year at IOM very pleasant and enjoyable. She kept us informed and made sure any issues if there were any, were addressed in a timely manner. You could tell that she enjoyed and was very passionate about her role as a class advisor. The Board of Regents staff was very welcoming from start to ending. They were such a great group and easily approachable. I can't wait to get back next year. This was an excellent year!

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Our class advisor was good but I would have liked to have an advisor that I didn't work with on a regular basis.
- Enjoyed by first one-on-one discussion with [removed]. Institute staff and class advisors are always a great help!
- Our class advisor was not as friendly as in years past. Her attitude somewhat put a damper on our class.
- [Removed] was terrific.
- I felt the staff, faculty, advisors and Board were all extremely friendly and helpful this year! I felt as if there were a renewed sense of motivation and spirit!
- Everyone was so welcoming and helpful all week!
- Lining the hallways cheering us in and out was the BEST! I cried leaving the last day! So emotional!
- Did not interact with Institute staff. BOR could have been more engaged. Class Advisor was AWESOME.
- [Removed] was an amazing advisor to our class!
- Our class advisor was odd. She didnt do anything wrong, per se, but the relationship with the class just wasn't there, as it had been in previous years. I was disappointed.
- Top Notch!
- Our class advisor, [removed], was over the top. If you didn't know it, there is no way you would think it was her first year being an advisor. I hope she returns to guide upcoming classes through the process.
- Our class advisor was [removed] and she was awesome!
- I really believe Institute staff should be strongly encouraged to be members of their local chambers. I know IOM is open to other associations, but this is run by the U.S. Chamber Foundation and is dominated by chambers. There are two IOM staff from our region and the responses we have gotten when we tried to meet with them were appalling. How can staff teach attendees how to be good chamber leaders when they do not value chambers at all? Furthermore, the staff should be encouraged to vary their stories and slides. I sat through one presentation that was EXACTLY THE SAME as last year.
- Everyone is great and very helpful. The only reason I gave the Board of Regents less than 5 is because I was in the class when the instructor [removed], made very inappropriate remarks. It was reported to the Board and I heard he resigned as an instructor; however, I was surprised that no one addressed our class nor approached the women to whom his comments were directed. It was, in my opinion, a missed opportunity to show strong leadership and support of the class. It was an unfortunate and ugly situation - it certainly warranted communication from leadership.
- Not that they weren't important, but any customer service from the Board is largely behind the scenes, but I had a couple of questions, and the chair helped me get them answered very quickly. The hotel staff was really friendly as well.
- I liked the fact that the hotel was staffed by students - what a great training opportunity for them!
- extremely welcoming; friendly and engaging

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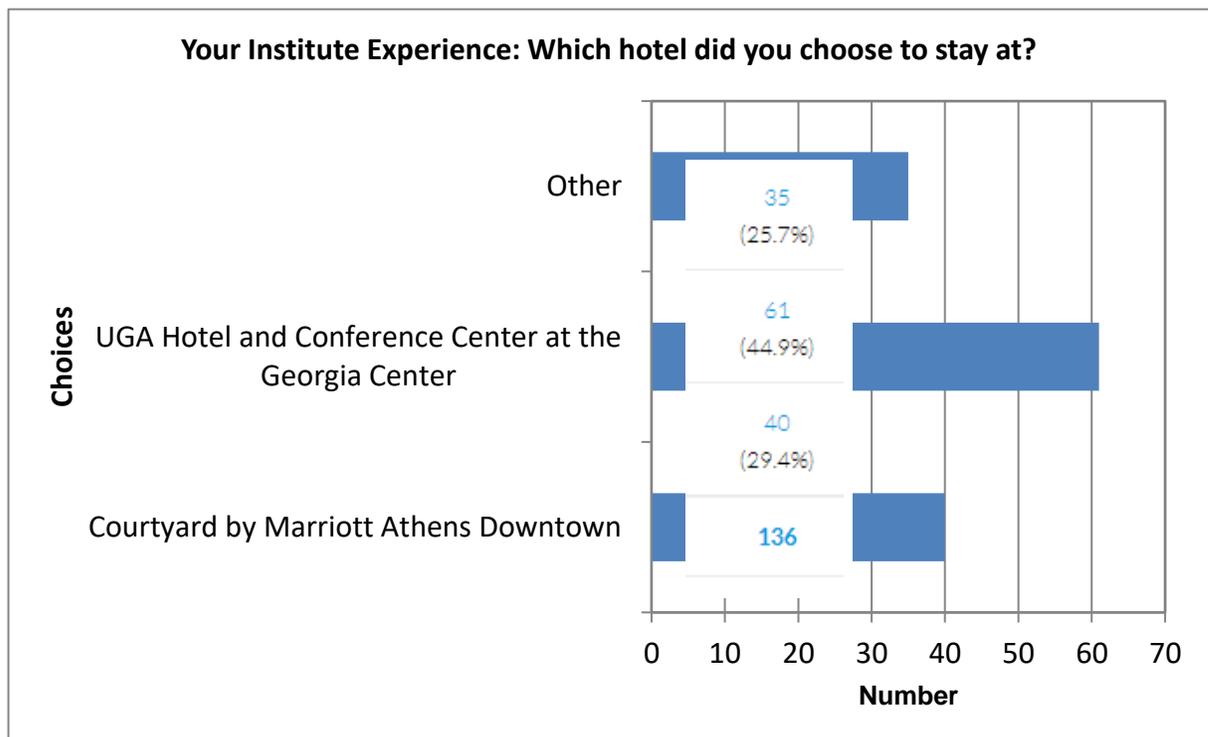


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U.S. CHAMBER OF COMMERCE FOUNDATION
Institute for Organization Management

ATTENDEE SURVEY RESULTS AND FEEDBACK

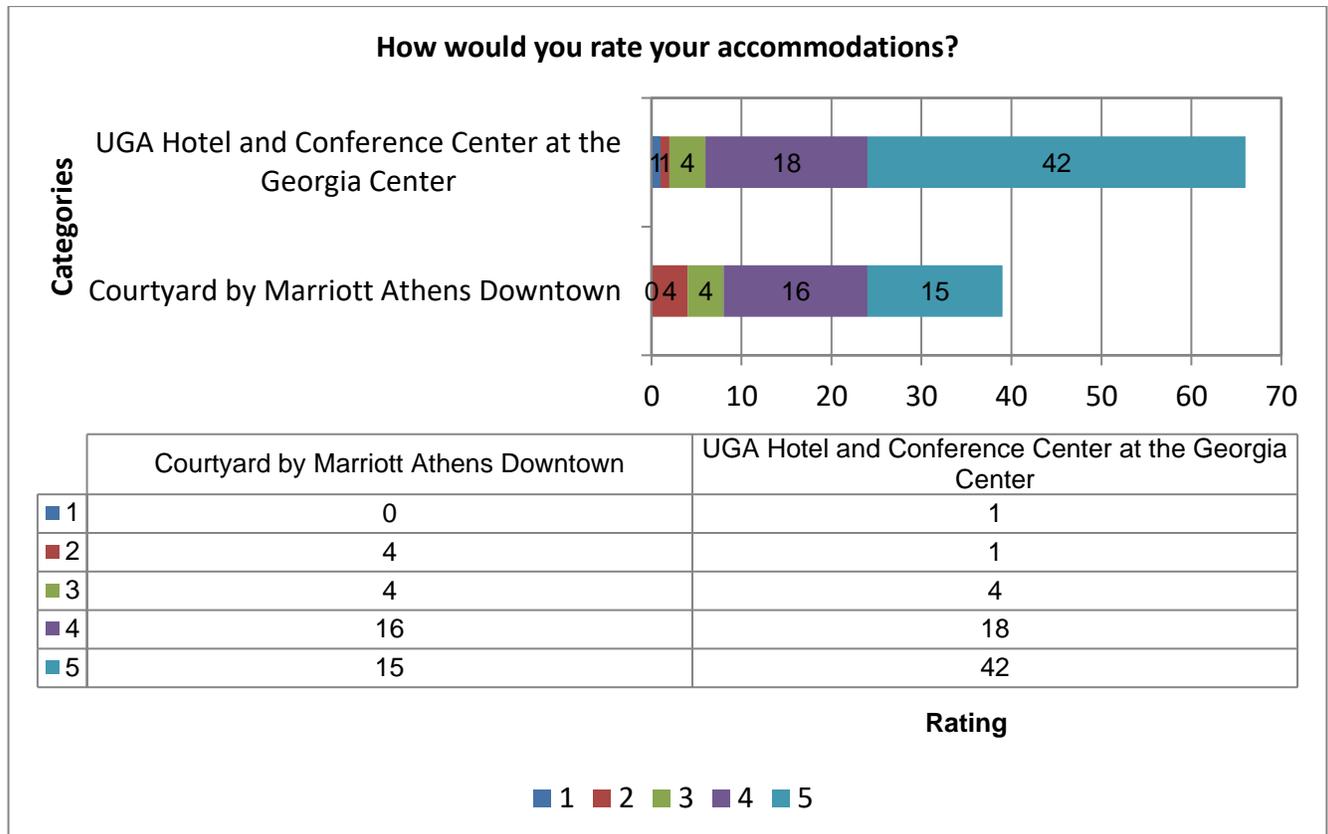
- Everyone seemed genuinely committed to our succeeding.
- I love the energy of the staff and advisors! [Removed] was an amazing advisor before and during the class!
- [Removed], Class advisor was amazing! I wish we could keep the same Class advisor throughout the 4 years when possible. The cohesiveness of the group is so much better.
- Staff, advisors, and Board of Regents were all awesome. The hotel staff also went above and beyond when asked.
- Our class advisor and board of regents were both awesome!
- Customer service was great around, everyone made you felt very welcome to be there an gave great encouragement.



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



ATTENDEE SURVEY RESULTS AND FEEDBACK



	Courtyard by Marriott Athens Downtown	UGA Hotel and Conference Center at the Georgia Center
1	0	1
2	4	1
3	4	4
4	16	18
5	15	42

	1	2	3	4	5	Total
UGA Hotel and Conference Center at the Georgia Center	1 (0.9%)	1 (0.9%)	4 (3.6%)	18 (16.4%)	42 (38.2%)	44 (40%)
Courtyard by Marriott Athens Downtown	0 (0%)	4 (4.2%)	4 (4.2%)	16 (16.8%)	15 (15.8%)	56 (58.9%)
Totals	1	5	8	34	57	100

Additional comments about accommodations*:

- I already booked my reservations for next year at UGA hotel. I didn't mind the Courtyard by Marriott, but I wished I would have been closer.
- New rooms are very cramped but every hotel staff member I encountered was amazing and the room was clean. I don't think you can beat being in the same building as the classes and events.
- I give a one b/c its so disappointing that the conference is an hour 1/2 to two hour drive from the airport. Very inconvenient for travel. I know that it will always be at UGA b/c of the history but it is a bad travel location.
- I really appreciated the option to ride the shuttle from the Marriott to UGA!
- Enjoyed staying at the Courtyard again this year just wish the shuttle ran a little longer at the end of the day if we want to meet with other professionals for our industry consultations.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I chose elsewhere due to having points/status at another chain.
- I enjoyed staying there and was glad that I could get back and forth on the shuttle bus!
- The UGA Hotel accommodations were great. The shuttle service and valet service attendants were AWESOME!! They were friendly and didn't hesitate to offer their assistance. They were very accommodating and provided lots of information about the area and the school.
- The Courtyard is a terrific facility. There was a minor issue with room keys not working regularly, but the staff and cleanliness were terrific.
- Rate a 10 for hotel service and staff.
- Love the renovations made to the rooms.
- I have stayed at the Holiday Inn each year and have had a fantastic experience. The staff are friendly and helpful. I love the pool and the full service restaurant. They have an exercise room and lounge. They go above and beyond to meet accommodations. The location is perfect for a quick commute and they provide a shuttle. The walk to the all of the restaurants/ bars/ shops and CVS is quick and easy! I recommend it for anyone who can't get into UGA.
- Rooms were very small but very clean and excellent room service.
- It was nice being able to walk to the downtown area for dinner/entertainment in the evenings.
- My next door neighbor had 7 a.m. conference calls every morning that I could hear so clearly I tiptoed around to make sure I wasn't heard. Other than that, everything was great!
- They had cancelled my reservation by accident but the staff was right on it and found me a room pronto! Fantastic service.
- I wish the IOM shuttle information had been provided earlier by the Courtyard. I took a picture with my phone of the shuttle schedule sign in the lobby when I checked in, but a lot of my classmates didn't even see the sign.
- Regardless of the renovations taking place, I absolutely love staying at UGA. Whether it was staff at the reservation desk, concierge desk, coffee shop café or the Savanna room, everyone was just very pleasant and willing to go above and beyond.
- Had some issues but didn't ruin my stay. Enjoyed the after-hours networking with folks also staying at this hotel. I am staying at UGA next year.
- Construction was challenging as I brought my husband with me who hoped to do some reading....otherwise, the room was great and quiet after construction hours.
- Can't wait until construction is over!
- I'd rather have a hotel that offers breakfast with stay. Courtyard has Starbucks/Bistro for purchase which is way overpriced. \$3.51 for a plain bagel. Crazy.
- The hotel was nice. Me and at least 2 of my classmates had our key cards deactivate while we were there and had to go back downstairs to get new ones through out the week. That hadn't happened in the past 2 years.
- Hilton Garden in was great.
- Not that it's a huge issue but the construction in the hotel was somewhat disruptive.
- Convenient to be in the conference center. Room was a bit tight but comfortable. Restaurant food wasn't the greatest.

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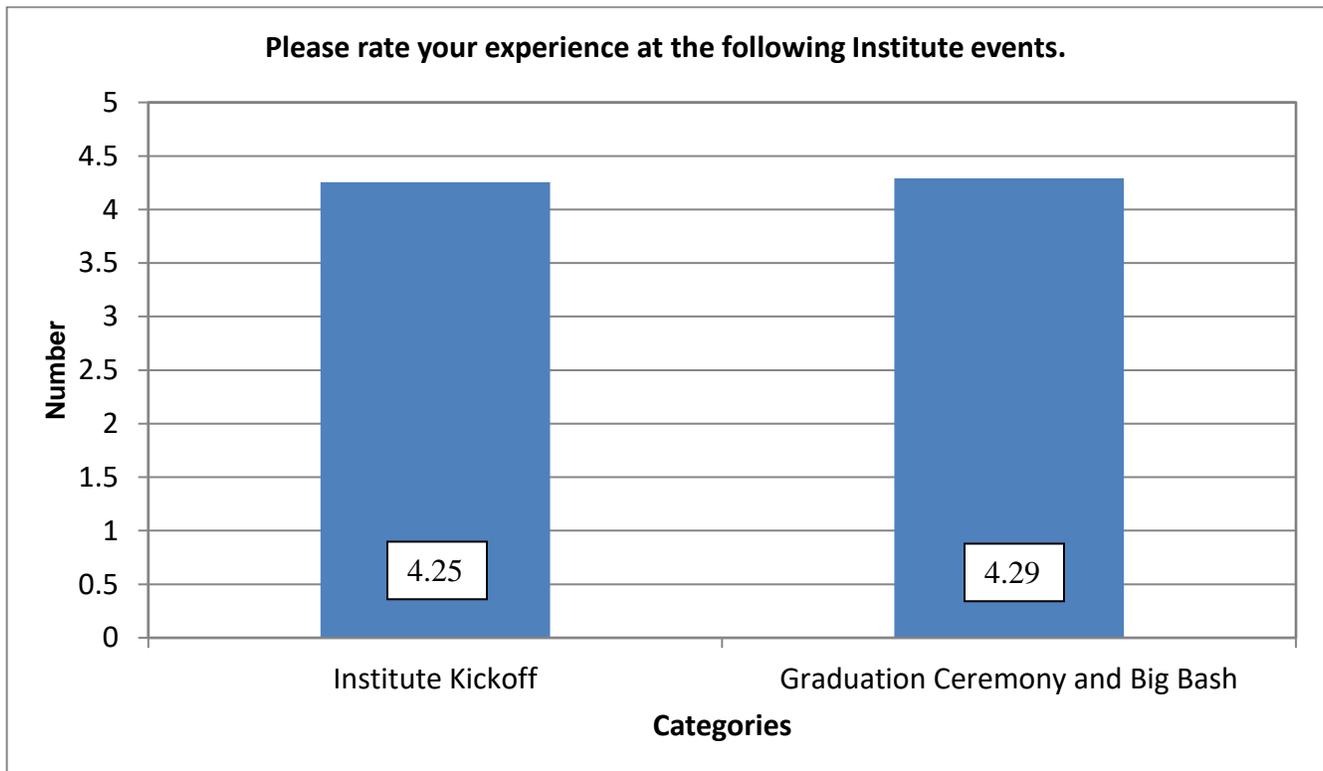


SOUTHEAST

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- The hotel was very run down and the rooms smelled like cigarette smoke. The Courtyard by Marriott was also not in the best part of town.
- Marriott was on a sketchy street but accommodations and the food were very nice.
- I wish there was a way to comp the parking for those of us who choose to stay offsite. Or, at least offer it at a discounted rate. I stay offsite to save money on hotel costs. Any little bit of savings help!
- The hotel is our favorite to stay at. The rooms are great and the remodel is very pretty. The only complaint is the shower head was terrible! Zero pressure and very tiny.
- The Marriott was great. It was close to downtown which was nice. I wish it had been within walking distance of UGA (in terms of connecting with classmates), but I could easily take Lyft.
- The Hotel was clean and service was great. Each time I returned to my room it was clean.



Additional comments about events*:

- The kickoff could be skipped. Allow more "free" classroom time with our class.
- While the meals were overall better this year, the Big Bash dinner wasn't great.
- Kickoff was a bit long, wish I could have used that time to connect with my class. It was hard to connect at the brewery too many people.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I didn't love having to travel so far to the Terrapin for a kickoff event. The kickoff wasn't anything special, so I simply gave it a 3 as a neutral event.
- The food at the graduation ceremony was terrible. The salads had sat on the table too long and were hot. The fried chicken should not have been served on the bone and it was soggy. The rice was awful as well. Most of my classmate including myself do not eat tomatoes, so those chunks were a major turn off. Although I am I first year, I have heard several times that this meal is the worst of the week.
- Please consider bringing back the reception in lieu of the Institute Kickoff. I have a staff member that started IOM this year. Her class had 37 students. They had a difficult time bonding due to the size of the class and for lack of facilitated networking early in the week. The food selection for the Graduation Ceremony was unacceptable. Chicken should never be served on a bone at a formal sit down dinner. Several attendees left the event to eat elsewhere. Also, please consider reserving tables for all classes and not just 4 year.
- Glad to have the kickoff back. I think it is more important for first years than later but we had a great time with our class.
- Kickoff was too long - people talked too much. Graduation ceremony food was horrible.
- The food at the Graduation was maybe not the best choice? I never serve chicken on the bone at events due to how difficult it is to eat in a delicate manner. It was also fairly flavorless.
- The dinner served at graduation was not good at all. No one at my table ate dinner.
- I understand that my class had a bit of a reputation (4-2) however we are all professionals spending money and most importantly time at IOM away from our families and day jobs. I didn't appreciate the huge eye roll I received from the Chair just as I was about to walk into the stage as she was handing me my diploma. I didn't find that to be particularly professional or a representation of all the hard work I've put in over these past four years. Also, our class ate lunch out of the cafeteria daily and it seems that was frowned upon. My experience at the graduation ceremony validated our decision. I registered as I have each year as a gluten free vegetarian and I never received my red card this year. When I arrived at the dinner I was told that the chef didn't prepare anything for me because they didn't know I was coming... I ate a plate of romaine lettuce and a few vegetables covered in red sauce for my dinner. It was this and the conference center bringing me items that contained gluten which I was allergic to (and food quality in general) that sparked our class' decision to not dine within the program. I might suggest making food optional and adjust the price accordingly.
- Other than the quality of the Chamber chicken dinner (which is low on my priorities list), these events were top notch. Perfect length of time allowed!
- Thank you so much for bringing back Institute Kickoff!!
- I enjoyed both events.
- Kickoff was long and unnecessary. They went over the time that was allotted which caused us to miss the shuttle following it.



SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- It would be really nice to have a photographer there taking a picture of the graduate when they are handed their certificate. It would really take no extra time than the normal process of walking across the stage. Not only have all of us worked hard, we all would like to document our success. Some of us travel by ourselves and have no other people from our respected chamber there or family. It would just be a nice addition, it's not like the classes are 100 people!
- While I thought the graduation ceremony and Big Bash was good, I would consider other options for food. Out of the whole week, it was probably the meal I liked the least.
- Graduation was a lovely evening - thank you!
- I loved the Kickoff event this year! We didn't have one last year, and I felt like because of that there wasn't really a "start" to the week. The Kickoff got everyone excited for the week.
- See previous comments about meal quality at the Big Bash.
- The meal was not impressive or a tasteful selection.
- Glad the kickoff came back - made this comment last year in my survey and someone listened.
- You could tell from the Kickoff to the Graduation and Big Bash that a lot of details went into planning this event. The only negative was the food at the Big Bash - the fried chicken was too salty, the green beans were not cooked correctly and the dessert was awful. I would also suggest that the tables for the graduation be assigned so that all classmates could sit together for years (1-3). You could also have everyone to select their dinner choice (meat only) ahead of time for the meal. Since everyone would be seated with their class this would make it easier to serve the meal. I would only change the meat option. All other options (starches and vegetables) would be the same.
- I believe kick-off needs to be on-site especially for all first year. It was hectic and crowded.
- Our class experienced an ice breaker with other first year classes our first year and it was excellent. We reflected on it again this year. Then we liked the combined gathering following it. Last year there wasn't anything organized so we created a class gathering and really enjoyed it but it conflicted with what appeared to be a last minute organized event. We DO like having some type of gathering on Sunday. AND we all think that it would be great to even have an elective class on Sunday instead of a gathering to help lighten the load on Monday. Just something for thought.
- I liked having everyone come together for the kick off after home room.
- The kick off seemed a little weird but was a very nice gesture. I was expecting something more than pretzels and beer so close to dinner, but I appreciated the offer. The big bash was nice. It seemed a lot quicker than last year. The DJ played good music, the food wasn't great at all.
- Reception at brewery was announced too late as we had already set up a reception at another venue for our class. Big Bash food was sub-par again. A spouse ticket for \$80 is highly overpriced for what is delivered.
- The food at Big Bash was not good, and I was thinking about the yacht we were on when I attended West and was wondering why Southeast is just held in a ballroom. Nothing special as many chambers host their events in ballrooms. Although the graduation ceremony itself was very nice.
- The DJ was very nice and we loved his set at the Big Bash.



SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Our class had it's own kickoff arrangements scheduled before IOM kickoff events were announced.
- Big Bash is the highlight but it's always cut short early. We were just getting into the fun, the dance floor was packed and they quit. And the food was horrible! very salty chicken something. None of us liked it and went out to eat after.
- I wasn't aware that there was a kickoff this year, which go back to the previous comments about the class advisor. Our group just wasn't really into the kickoff for whatever reason. It was a weird year. The big bash was fine...I never really stay long at this event, but will next year (year 4).
- Missed the kickoff but ending ceremonies were lovely. Photo booth and reception were lots of fun. The food was not good - at all.
- I really liked the Kickoff, though the place seemed understaffed with only 2 then 3 bartenders for such a large group. As it was, my cohort elected to leave early for dinner, so I didn't get to enjoy it as much as I would have liked. I'd recommend communicating to classes ahead of time that they should plan for dinner after the kickoff event, as the reservations were made prior to our arrival. The graduation went smoothly, and the party was fun.
- The food at the Big Bash was not good. Otherwise a good event.
- Big Bash: The food was an odd combination and the chicken didn't have much flavor. Graduation: It would be good to welcome everyone, let the 4th years come into the room, allow us time to get through our salads and the entrees to be delivered and then have the speakers come up or something along those things. The timing felt awkward this year for some reason.
- The chicken was very dry.
- Not a big fan of the dinner at the Big Bash. Fried chicken and mexican rice didnt seem to go together. Also, not having assigned tables for the classes made it very stressful to find a seat. Everyone wanted to sit with their classmates but had to mad dash to find some seats and there was tension.
- Great event at the brewery. If there is more food next time, people will probably stay longer.
- The graduation food was not good, but otherwise the event went well.
- Missed first bus to the Kickoff party and would have missed colleagues/friends and dinner if I had tried to go on another mode of transportation. Would be nice to have Kickoff on site or closer to the hotel.
- Loved the energy at both events! dinner -fried chicken and rice- at the big bash was not great though.
- Institute Kickoff was long due to having so many to speak but I understand having to squeeze in the sponsors and org reps to say hello. Graduation was really nice. I didn't stay to drink or party. The meal was very good.
- Institute Kickoff is a great reunion for upcoming classes and great orientation for first year.
- Kickoff was great this year! It provided a sense of cohesiveness and intro to the week. The level of enthusiasm set the tone for the week! The Big Bash was fantastic this year. The ceremony was quick and tasteful and the DJ/reception was so fun!



SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- So happy that the Institute Kickoff returned this year, a great experience to have everyone in one room to start the week. Also, the reception that night at Terrapin Brewing was wonderful, BIG THANK YOU to the Georgia Chamber, Athens Chamber and Publishing group that made that night possible! Graduation was wonderful as always. It is inspiring to watch the graduates complete their four years and know that they are the difference makers in their communities. I gave it a 3 because the food was terrible this year at graduation. All week our lunches were amazing, but dinner this night is the only complaint I have about anything at Institute.
- Loved going to the brewery at Kick Off. Met a lot more new folks that way than the onsite event.
- The kickoff was fine, I was just rushed in checking in and getting back at a decent hour. And for those of us who do not drink, the place did not offer an alternative other than water.
- The kickoff was much better this year - loved hearing from the class advisors and the Board of Regents. If there is going to be a Institute wide gathering on Sunday evening, would love for that to have been communicated sooner. Our class 3-1 had already signed a BEO for a private gathering because we didn't think anything else was happening. We welcome all opportunities to get together with the entire IOM SE group!
- To me it would have made more sense to go ahead and eat then do the ceremony. Food wasn't put down until almost 745. Food at big bash was terrible.
- Kickoff was good. It's mostly obligatory speeches and cheering for the helpers, but that's okay. At least it was relatively short. Graduation was good. It's great that the wine gets circulated on trays which speeds things up. Something other than fried chicken would be nice since we're all dressed up. The Big Bash was fun. I wish the dance lasted until 11. Ending the night at 9:30 or 10:00 seems so early.
- Food at graduation was terrible. Institute kickoff was helpful to start the week and the event that Sunday night was really nice.
- At the Athens location, in particular, since there are so few association representatives, I would suggest maybe a mixer for Association folks.
- Was disappointed this year by the food at the Big Bash.
- The kickoff hosted by the Chamber and some industry partners at Terrapin was awesome. So much fun - and a great way to get to know new people in a fun environment. The food was good, and the beer was great. Awesome way to show off some local businesses as well - nice to get off the UGA campus for a bit.
- The Graduation Ceremony was great other than the dinner served. Not one person at my table ate dinner. The chicken appeared crispy but actually wasn't. The rice was awful. I did not like the sweet gravy provided. The green beans were so hard you could not even bite into them. My entire table left when dancing started and went to grab a bite to eat downtown.
- Felt as though all activities were "hurried."
- Did not feel as though we had enough time to get settled without being late or missing something else.
- Both events receive an "Excellent" from me, well planned and orchestrated.



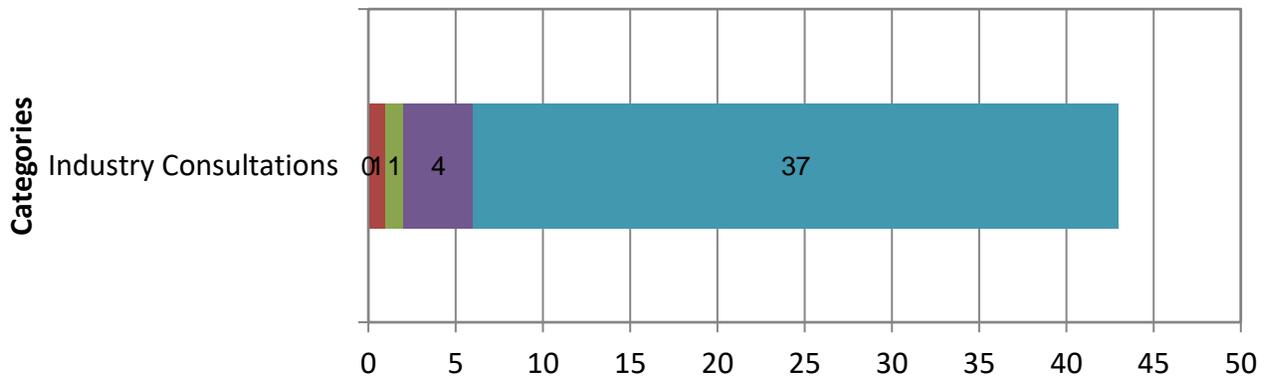
SOUTHEAST

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Many from my class wished that the DJ would have been around longer like last year and that the bar would have been opened longer. The food was a strange combination and I would recommend not having something that is typically eaten with your hands.
- Our group will be staying Saturday night next year so we can be well prepared for Kickoff. We were very late due to our long drive.
- Graduation/Big Bash was disappointing. The food was horrible and trying to find seats for our class to sit together was impossible. In the future, it would be nice if tables were reserved for each class.
- The location was wonderful and everyone had a great time. My only wish would have been for options other than beer or water.
- I didn't spend a lot of time at the Big Bash after the graduation. I lost my mother the week before Institute so I wasn't in the "party" frame of mind. That being said, look out next year! I'll be on the dance floor!!
- Graduation Ceremony - The food was not up to the standards of the food served during the lunch periods.

Please rate your experience participating in industry consultations.



Industry Consultations	
1	0
2	1
3	1
4	4
5	37

Number

1 2 3 4 5

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ATTENDEE SURVEY RESULTS AND FEEDBACK

Industry Consultations	0 (0%)	1 (0.7%)	1 (0.7%)	4 (3%)	37 (27.6%)	91 (67.9%)	134
Totals	0	1	1	4	37	91	134

Additional comments about industry consultations*:

- The consultations were very helpful.
- They're always rushed and too quick but [removed] is amazing and was very helpful.
- Industry consultations are under utilized because most people feel rushed or have to return phone calls and emails during the break. Industry consultations should be more like an elective where you have that one on one time uninterrupted.
- I didn't get a chance to talk to [removed], but I wanted to!
- I did not participate in the industry consultations this year but plan to next year.
- I felt like my consultant talked more about himself than he was of help to me.
- Great idea - needs something more but not sure what.
- Even though I didn't utilize this resource, I did see a lot of these happening this year. I think it is great to offer!
- I enjoyed speaking with [removed] during my industry consult. He gave me some great feedback on how to enhance my events and ways to increase my non-dues revenue. He was very knowledgeable and was very passionate about giving advice and helping Chambers succeed.
- I did not participate this year, however I have found great value in the past with industry consults!
- The visit with [removed] was a nice addition for me at IOM. I plan to keep him updated on the subject throughout the year.
- Heath provided some great information.
- [Removed] was a wonderful source of suggestions/ideas/information. It was great to have the opportunity for a one-on-one.
- Industry consults may be more effective if not programmed into breaks.
- This is the second year I've done the consultations and I'm still disappointed. They don't seem to grasp the concept of helping me with whatever my issue may be. I wasn't going to do it again this year but gave it a shot and was very disappointed with the advice, or lack thereof. Next year I'll either choose a consultation person or I'll just skip it.
- I did an industry consultation last year and probably won't again. The person I met with offered no guidance, but did say she would send me info that might help. I didn't receive anything from her.
- This is probably more on me than the consultation itself, but I wish now that I would not have scheduled my consultation at lunch because I was eating instead of taking notes and now it's hard to remember what the takeaway was from our conversation.
- THIS WAS AWESOME! And a gold mine. Keep it!
- The industry consultation was extremely helpful. The facilitators spent additional time on the subject matter which is one situation I did not need the consultation that was requested.

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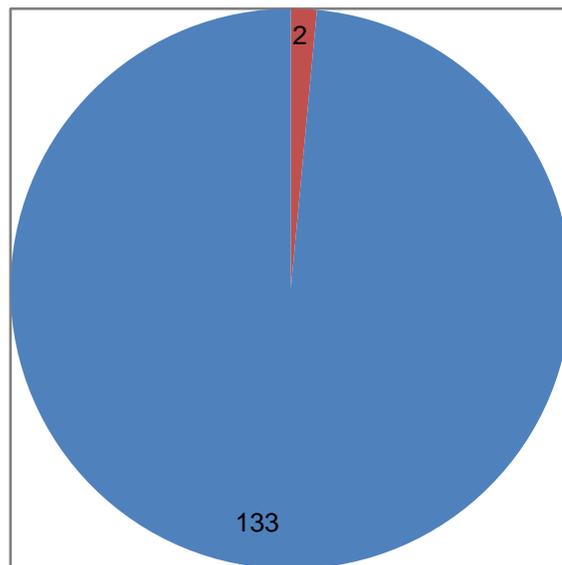
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ATTENDEE SURVEY RESULTS AND FEEDBACK

- The only issue I'm having that I'd want help with is how to move up.
- Mark was amazing as always and even offered more help when I returned to my Chamber.

Did you download the 2019 Southeast Institute App?

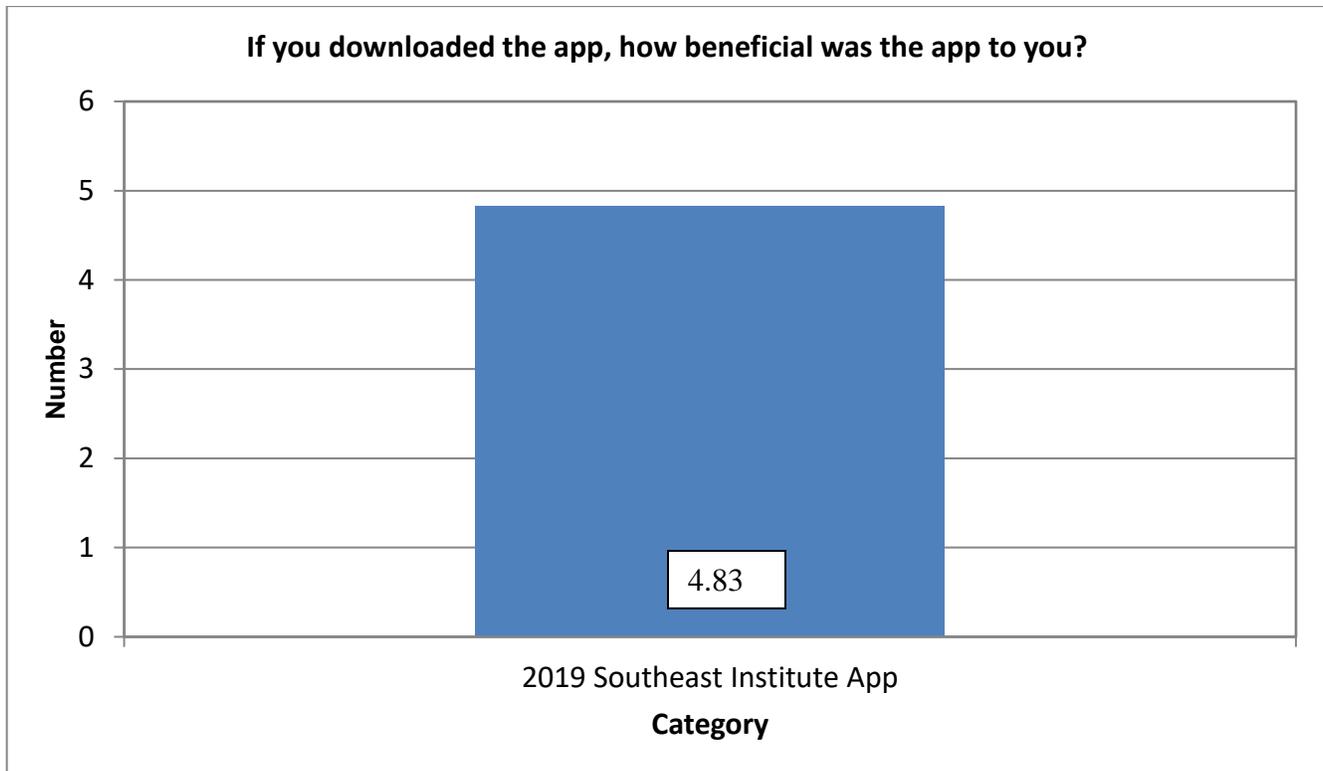


■ No
■ Yes

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ATTENDEE SURVEY RESULTS AND FEEDBACK



Additional comments about the app*:

- Great app.
- The app made it easy to access your schedule as well as instructor materials. I continue to use the app for reference even after completing institute.
- Way better than last years!!
- Huge Improvement.
- Emailed powerpoints in advance is needed. It is difficult to download the resources from the app on your phone and get it transferred over to your computer.
- I wish it would show you, after the fact, that you have completed a survey of an instructor.
- Enjoy the app feed and seeing new pictures every day!
- Absolutely essential!
- Next year, if our class documents are placed on the app again please communicate this. It was difficult to find class materials.
- I loved the app! Easy to use and very handy to have.
- I could not download it this year. I clicked on the link in the email that was sent several times and it took me to a landing page not a page to DL the app. I searched for Southeast Institute 2019 in the apple store as well and it did not pull up so I gave up.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I loved it. It was convenient and easy to find my schedule and IOM information. I rather evaluate each session through the app. It was so easy.
- Unsure how to purchase ticket for my guest for a big bash. My class adviser wasn't sure either
- I wish I would have downloaded it sooner than I did, my only regret!
- I think that the App was great and very user friendly.
- I was impressed with the app. I changed my mind last minute on which elective course I wanted to take, and the app made it easy to do so.
- The app was not user friendly. I had a hard time finding download for assignment. I had a hard time obtaining my password.
- It is a great professional development with a wealth of knowledge. I wish this program was in place as a mandatory for chamber staff that have an interest in chamber and making it a career option. It is such a benefit in educating you on the level of understanding the chamber industry.
- I thought the app was very user friendly.
- Great for scheduling purposes.
- Looking forward to next year!
- The only challenge I had with the app was not having access to the documents from the instructors any place other than the app schedule. If there was another option, please disregard my comment and ignore my ignorance!
- I used the app for everything. I liked not having a bunch of paper.
- Liked the app but the instructors changed some of their content after they downloaded the class material.
- Very useful - wish info was available sooner, and reminders sent regularly in advance of IOM
- The app is great!
- I used it the entire week!
- It was a pain in the ass to find, and you had to differentiate between the browser version and the app version, but one you got over all that, it worked really well.
- Very helpful.
- Very easy to check schedules and look at speaker bios and topics.
- It was very useful to be honest.
- Great app.
- The app was great - easy to use - and very helpful. Since it was an app I had it on my phone, always at my fingertips.
- A map of the actual GA center would have been a nice addition. There was only a map of Athens.
- I used the app the entire week! Definitely a keeper.
- Would not have wanted to do IOM without it.
- Downloading the course materials was a problem. I had to email them to myself and then download. There should be place where you can download them directly.
- Wish we could keep the app through the year. I haven't tried to export the contacts and faculty info. Hopefully, I can get that captured.



SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Loved having everything so easily available on the app!
- The app worked very well and kept things organized and easy to manage.
- Loved the app! The navigation was easy for me and I loved the accessibility to modify electives! I utilized the photos as well!
- LOVE THE APP! It made accessing handouts during classes so easy, reviews were simple to complete. Only addition to the app I can think of, and it might be impossible, is a link in the app to the silent auction. Great job with everything!
- I couldn't figure out how to pull up handouts and powerpoints on my desktop. If there was a place those were uploaded other than the app, I couldn't find it. Probably just user error.
- I loved the app - it was easy to follow my schedule and VERY easy to change my elective at the last minute. I will be honest, I did not do the class surveys as automatically on the app.
- I'd rather it just be available on a website instead of an app. While that's an option, you're logged out when there is a gap in activity. That would be between most classes. I like having one place to go for everything though.
- I liked the app very much. It was nice to have all of my handouts in one place without having to print them or open them in my email.
- The app was great, but I wish more people used the directory aspect and interacted there. Especially, if I was caught chatting with someone without a business card in my pocket (between sessions, etc.), when I said we could connect by the app to reach out post-conference, they weren't really aware that that was possible.
- This app is so cool and I loved having all the information I needed at my finger tips!
- Great job on the app. I would like to receive it much earlier though so I can review the uploaded content and print/download as needed. I didn't have a lot of time to prepare for downloading all of the content. Earlier is always better.
- The app was incredibly helpful to keep up with the schedule
- Would be helpful to have photos preloaded; perhaps submit with registrations.
- This was a definite plus! Being able to access the people in my group was instrumental when I lost my glasses one evening and was able to find them through the app contacts.
- Could not get it to download on my app. I had my laptop so I was able to access information.
- If you did not download the app you would not have had any class/materials information.

Answer Category	Choices					Totals
	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	
The Institute curriculum provided valuable professional development.	2 (1.5%)	3 (2.2%)	2 (1.5%)	54 (40%)	74 (54.8%)	135
The Institute courses were conducted at a suitably challenging level for me.	3 (2.2%)	7 (5.2%)	13 (9.6%)	65 (48.1%)	47 (34.8%)	135
Institute provides a good networking opportunity in nonprofit management.	2 (1.5%)	0 (0%)	1 (0.7%)	30 (22.2%)	102 (75.6%)	135
Totals	7	10	16	149	223	405

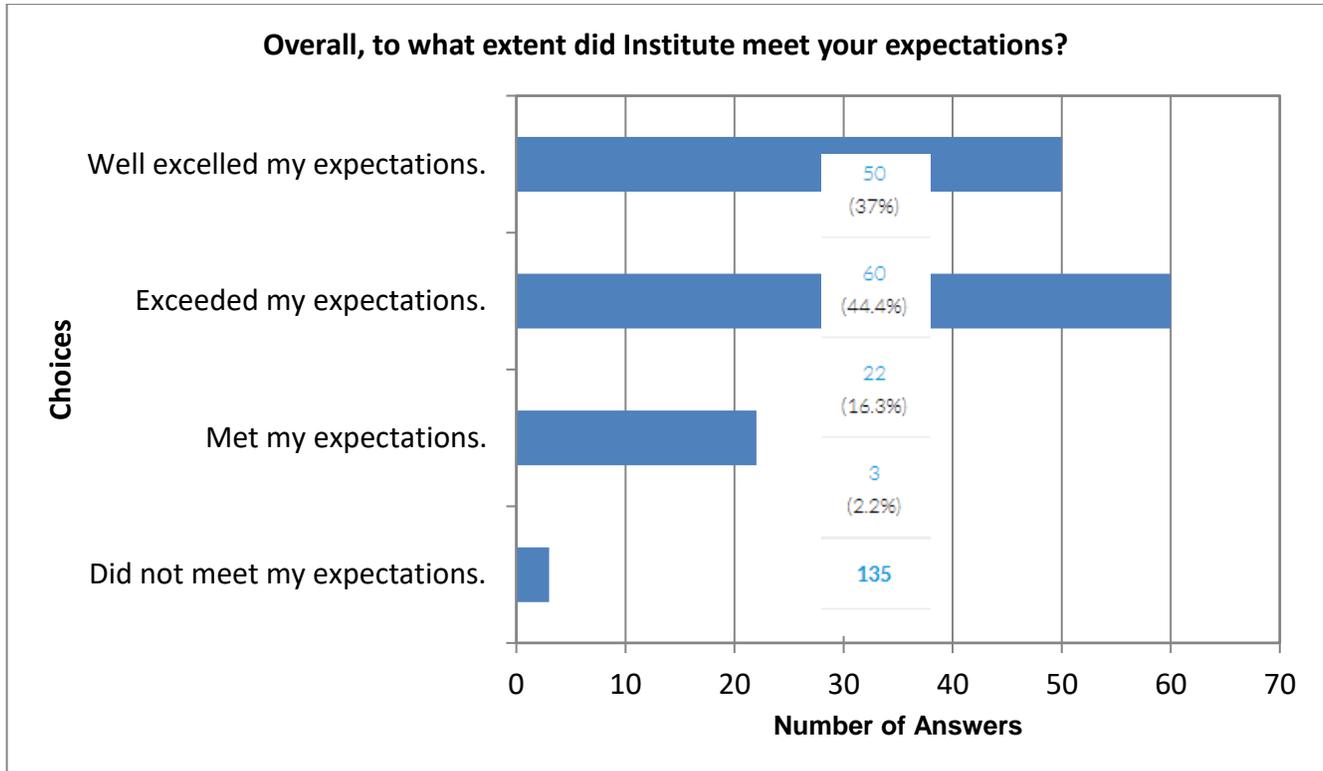
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SOUTHEAST

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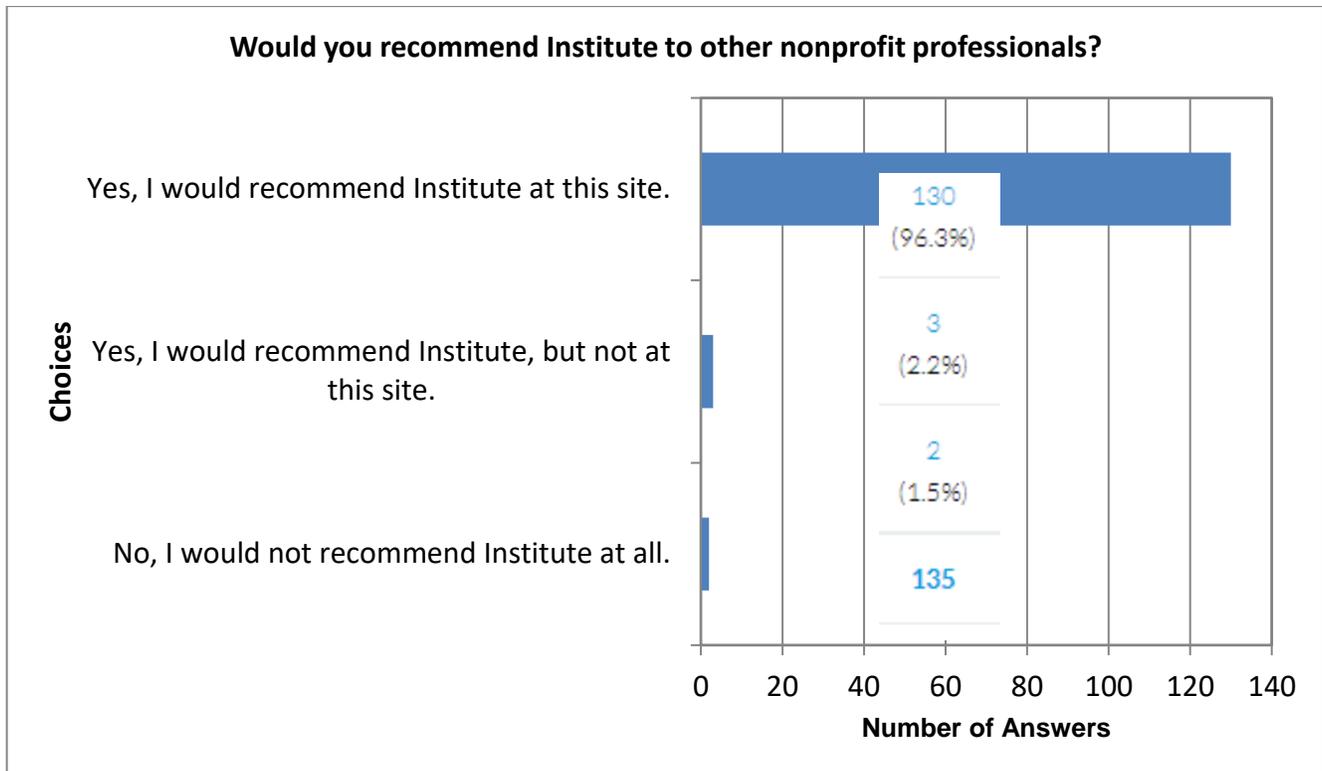
ATTENDEE SURVEY RESULTS AND FEEDBACK



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ATTENDEE SURVEY RESULTS AND FEEDBACK



Additional general comments about 2019 Southeast Institute*:

- I would love the opportunity to take the electives, based on availability, even though I have completed the program. So many topics, especially technology, change every year and the chance to take refresher sessions might be a good source of additional revenue for Institute. I am not sure how many graduates would take the refreshers, but even your instructor [removed] would tell you to give your members an option of yes, yes, or no. You've left grads with only a yes/no option to give you money.
- As always, Institute is hands down the best professional development opportunity I've ever been a part of. I found that several instructors this year were not as engaging as I have had in the prior two years, and I didn't take away as much as I usually do, with some courses overlapping in similar ways to past classes. I was disappointed in our class adviser, as was the majority of our class. She was very disengaged, not informative and very reserved. She ended up leaving our class dinner with the rest of the class still there, finishing dinner and waiting on checks. There was little leadership from [removed], as compared to our class' previous two advisers that were very involved and respected by the class.

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



SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- 1. Ensure all professors especially new ones are prepared for the length of class and understand the structure. 2. Ensure food quality improves and allergies are taken seriously or make participating in the meal plan optional and adjust price accordingly. 3. Ensure all Board of Regents, the chair and staff respect all students and maintain professional composure at all times.
- Classes are too long. More class topics need to be offered.
- IOM is an excellent experience and resource. The relationships and networking along with the education make this one of the best opportunities to strengthen me professionally and personally! I can't imagine doing my job effectively without these tools and training!
- This is a well run program and I look forward to two more years of professional development and expanding my network in the Chamber industry.
- I know you all can't do much about it, but the food at the UGA conference center is terrible. To be fair it always has been. I'm talking years before I even knew of IOM, they were serving terrible food. Honestly, I would have been happy to have an off-campus lunch or to just have a make your own sandwich bar each day. Of course, I graduated, but that is literally the only thing I can think of to be improved.
- Add some type of affinity groups early on in the week (based on your job title, state where you live, etc) - could be done during meals.
- Great program!
- In my opinion, the core course on customer service needs to be an elective. Also, government affairs needs to be an elective instead of a core class. The advanced economic development class was engaging and had so much information for an elective. We all do some sort of economic development and should be considered a core class.
- I am very disappointed in the the course curriculum. It was not challenging nor did the presenters bring much new information to the table. PLEASE get a group of fresh presenters who are industry experts vs. "consultants" who want to sell their books and services and even worse, they have been using the same presentations year after year. I am also discouraged to see so many (of the same) older white men teaching courses to a majority young and female audience. Have you considered using UGA professors? This curriculum needs a major update.
- Some of the classes were very repetitive. For example the [removed] Customer Service Class from Year 2 was almost identical to [removed] teaching Ethics in Year 3. [Removed] would be much better suited to each Ethics. I would suggest that the Curriculum Committee take a much closer look at the slides and offerings. The quality of instruction has declined.
- Lunches were overall good, but we are in the south as are most of the attendees. Please do not serve us BBQ anymore. Another soup and sandwich day would have been fine. Please have all condiments including lettuce and tomatoes on the side when serving sandwiches. Then the bread is not soggy. Also, at dinner with 8 classmates one night, 7 of the 8 people do not eat tomatoes. Those that do can easily add to the meat and cheese.
- My class had an awkward situation with one of the instructors, I believe it effected the the remainder of that class. I am surprised we never heard from Board of Regents on the situation.
- I felt a few of the classes were repetitive of classes from last year (1st year vs 2nd year).

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



SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- In addition to a Class Dinner night, it would be nice to have a night (whether it be dinner or just a social) with the other sections of your year to encourage cross-section networking and bonding.
- Overall, I believe in attending IOM, is a wonderful and rewarding experience.
- I enjoyed my courses this year but some of them seem like they would be better suited as electives based on your Chamber Size like the Government Affairs. My chamber is very small and we do not lobby on a national level.
- Food was better but still not good. If you continue to use the same instructors year after year for different classes, please ask them to change their content. They are presenting the same content for different classes. Same old stories, same content--not learning anything new.
- While I always enjoy networking and reconnecting with new and old friends, that's about to the extent of what I find valuable. The class instructors were very knowledgeable ... well most of them in their subject matter. I will say that there were times that I felt like I needed more. Like it wasn't deep enough and very surface considering the time we have in most of our classes. I would like to have some practical things to take away and things to make me dig deeper into what we are doing to really help my growth in my profession.
- I know it's hard to select food for these types of events, but variety would be nice on a daily basis as far as the break times. The same items were selected for each day...again, I know it's hard, but there were complaints on that among my classmates. I also know it's hard to pick meals for the graduation party, but this year in particular, the food was not up to par. I heard several comments from others...I had a vegetarian meal and that did meet my expectations, but there were lots of complaints about the chicken. In addition...one wonders what to do after Institute. I continuously want to learn and if there are additional webinars/learning activities, please announce those. The blogs on your site are very helpful. How can one volunteer and get more involved? Based on my recommendation, I have a co-worker attending the LA Session. I am excited to hear about her experience as that and the Midwest are the only locations I have not attended. You all do an excellent job! I thoroughly enjoy my time at Institute and always take something back.
- I realize it's a development program by the US Chamber, but it's marketed to non-profits as well. I found that in many of the sessions, the speakers were so ingrained with the Chamber, that their topics, discussions and presentations were so chamber focused that it was hard to relate it back to non-profits in general. There is a lot that is transferable, but it isolates you as a non-profit when everything is so focused on chamber activities and only a passing mention or half-hearted attempt is made to bring in the non-profit aspect into the discussion. The learning gets lost when associations are isolated from the conversation in the first few minutes. Also, it would be great to have the powerpoints available as powerpoint files so that if we did want to print, or save them, we could print as 3 slides to a page, or review the powerpoint as presented. Because (I was told) that the files had to be emailed to Institute staff for review and posting to the app, they had to turn them into PDFs as most were too big to email. It would be helpful to have a file sharing site that could be used to put them on the app for us to then download them in the native file.
- I absolutely enjoyed my first year at Institute! I have made great friendships and have so many new contacts to reach out to for problems and solutions! I cannot wait to come back next year and learn even more!



SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Would love to have a session or time blocked off to be able to discuss best practices within our class. That is a very valuable part of Institute. Would recommend some different choices for the lunches. Maybe a salad bar & sandwiches or grilled chicken with vegetables.
- Big Bash should be more special for the graduates and the other classes as well. We are chamber execs, we know what a gala should be. To me it is too much like a high school graduation. Recognize the regents and advisors at the kick off so that time during the big bash can be more about the graduates. Make the food at big bash something to be proud of!
- An excellent choice for professional development and connecting with other executives in the chamber of commerce industry.
- Love Southeast Institute! Great job to the staff, board of regents, class advisors and faculty. I've never attended another site, but will always say that Southeast is the BEST!
- The best resource for new and growing nonprofit leaders. The Best use of my time for networking and connecting with like-minded professionals. Valuable information, trusted professional subject matter experts, appropriate level of casual learning. The only suggestions would be regarding the food provided at lunch.
- I have loved all 4 years of Institute and I highly recommend it to Association and Chamber professionals. IOM certainly does education.
- Being from an association and not a chamber, I found the networking opportunities to be minimal. There were no other associations in my class and very few at the institute in general. While there are similarities for sure, there are many differences and part of the success of attending programs like this is to meet other people in your industry. While the lack of networking opportunities was disappointing, the classes and instructors were excellent overall and I learned a great deal. The staff was welcoming and energetic!
- It would be great to have a round table discussion time with classmates. The chairs were also very uncomfortable. What a wonderful experience I cannot wait until next year. Thank you very much.
- Please consider alternating speakers between classes. i.e. If John Doe taught a course in 2-1, have him or her teach 3-2 rather than 3-1. We heard a lot of stories and situations we've already heard. Also, it would be helpful if we could see what electives we've taken in the past so we don't accidentally take it again. My first year expectations were far surpassed. My class advisor [name removed] was THE BEST!!! Institute was an eye opening experience. Loved the enthusiasm of the staff in the mornings. Can not wait until next year! Already have my room booked!
- I absolutely loved the experience and can't wait for next year. I truly gained a whole new family. We laughed together, we cried together, and we prayed together. I turned in 4 or 5 referrals!!
- I have been to IOM at both Villanova and Athens. Both experiences were so different, but excellent. Athens is definitely more for the outgoing. I thought it was great and the way the Board, Advisers and all other staff greeted us every morning upon arrival was awesome, it got me moving! And NO I was not one of the all night people! Just an 11 gal! :)
- I would like to see classes on how Chambers will stay relevant in the future. I am concerned that we have become After Hour Social clubs and membership is declining. Our space is competitive and we have to adapt. Also, I would like to see a class conducted on Project Management. So much of our work is around projects.

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



SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I loved Institute and I learned so much from some pretty amazing people. I was so cold I hope you will consider sweatshirts next year or turn the thermostat temp up.
- Also, The food was fantastic but I was so thirsty and drinks were always locked up?
- My only comment would be about certain faculty members who have been teaching at Institute for a long time. Once you have heard one class by that faculty member, you have heard them all and therefore the class itself is not valuable. While [removed] is a wonderful man with great experience, I have heard him three years in a row... and while the class title has changed, the content the EXACT same... customer service, ethics, communication... core class and elective class. Had I known in year 2 in advance that he would have been the elective course teacher, I would not have signed up for it. Consider limiting him to first years only?
- Perhaps recommendations on what courses you might want to have already had for some of the electives? I feel like I had a few electives where a foundation course would have been beneficial to have beforehand. For instance, I didn't have my Financial Fitness class scheduled until after a 501c3 elective opportunity - because of this, I didn't take the 501c3 elective because I wasn't sure I would have the base knowledge to fully absorb the information.
- Everything was executed amazingly! I just wish we could keep our advisors the entire time!
- Our class was somewhat surprised at our curriculum this year. Many of the classes that were core were lower level than what we had last year or at least it seemed like some of us had taken them as electives last year. Some of the information seemed a bit redundant. The Is it Legal class was a waste of time. He was covering some of the same information we covered in Executive Finance and his information conflicted with what were told in the finance class. Most of us found the law class to be boring.
- Although the core classes were good, one of mine was a duplicate class from last year just with a different title. All of the material was the exact same, which the instructor even noted that she did not realize that she would be with the same class she had last year. At this point, she could have then chosen to do something a little different with us, but instead chose to continue, which was not a good use of our time when we could have gotten a lot from a facilitated class discussion of best practices. In the future, I would recommend that one of the core classes is a time for us (each class) to all share with one another what our best practices are so that we can learn from one another. Whether this is led by our class adviser or by a Board of Regents, this would be very beneficial as we often come to learn what works/does not work and hear of new ideas.
- Overall, a great investment of time and money. Looking forward to year 2!
- The info as well as the friendships that were made during my time are invaluable. The only thing I would change would be much larger scholarships for small chambers such as ours.
- Overall an excellent learning opportunity, which provides leadership and professional development.



SOUTHEAST

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Institute has been an outstanding professional development program for me. Each year has built on the past year, expanding the base and subject matter to encompass every area of organization management. The topics covered were well selected. The instructors were very knowledgeable. I appreciated the breaks but the noise level on some days exceeded my capacity to handle it. I realize it was provided to pep everyone up, make it fun and perhaps it was for those who may have stayed out too late the night before. Thank you for the buffet option, since as a pre-diabetic I have to select my food very carefully. I also appreciate dismissing on Thursday morning rather than Thursday afternoon or Friday morning. It makes traveling easier and misses the early weekend traffic. Great program! Keep up the good work!
- I believe the courses are not nearly as challenging as they should be. I would recommend IOM for the networking and the credentials it provides for CEO searches.
- The classes were really long for me. Having a 30 min break in the middle of class really drew things out. I would love to see 2 hour classes instead of 3 hours with more class options in same time period. The food was really good. Every day!
- IOM was and is a game changer for me, personally. Due to our Chamber losing the contract with the city for economic development, effective 12/31, I am now faced with possibly of stepping in as the new director/president of a standalone Chamber of Commerce as my current president will most likely take a position elsewhere in Eco Devo. I left IOM with the confidence in myself to lead that charge, if asked.
- A round table discussion with classmates would be a great addition. I think you can learn a lot from them. The chairs were very uncomfortable for a person with lower back issues. What a wonderful experience thank you very much.
- Awesome week of learning. The knowledge you gain not only from the classes but the networking with other classmates is extremely valuable. Can't wait till next year.
- I was disappointed in the instructors. I have heard several of them at my first year of IOM (in 2013) at other industry events. Same jokes. Same stories. No new information. What makes the classes valuable is the exchange of information between participants. I would prefer to see the classes taught by people working in chambers of commerce who have no books or consulting services to sell. Also, I would like to see a track just for chamber presidents/CEOs. That would be helpful for me.
- The class content was very informative and helpful to challenges we face in the Chamber World. I do have two suggestions; 1) Make the first day shorter. It is very difficult to concentrate after such a long day. One can only absorb so much information. 2) Offer more food choices. With today's population becoming more health conscious, offer more protein and fresh vegetables. Everything seemed so carb heavy.
- The only downside to Athens is that it's such a drive from Atlanta. That said, since we come in on a weekend and at least I was able to leave mid-afternoon Thursday, traffic wasn't a huge issue. Other than that, Athens is a great spot with cool places to hang out, and I will miss going back!
- We need more of how to solve issues, retention efforts, membership sales. It was more talking at us instead of what works, what can we do at our organizations to be better. More doing ideas, than talking especially to those that have been in the business for 5 plus years or 10 plus years like myself. We have seen a lot and tried a lot. I need wins, successes, even failures.

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SOUTHEAST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Having completed my 2nd year, I am enjoying Institute and it has helped me better understand 'Chamber world'. The biggest benefit I find is the networking and relationship building - that has been excellent and I continue to communicate with my classmates regularly. This year's experience was tainted by the incident with [removed] during C261 course. As I stated in other reviews, he was completely inappropriate but also throughly tone deaf in that he continued down his offensive path and tried to make jokes and minimize his words. Equally disappointing was the lack of communication from the Board of Regents after the incident. our class heard that [name removed] stated he planned to resign, however, no one officially addressed our class and apologized nor checked with our class to find out how we were doing. These types of incidents are sad and shocking but also provide real opportunity for discussion, introspection and growth. To that end, an opportunity was missed. To end on a positive, the information delivered is informative and useful, albeit somewhat basic at times. But the energy and organization of Institute is top notch and I look forward to my 3rd year.
- Please ask instructors to cut down on asking the class their name, title, geographic area, and what they want to learn from the class. On one hand, this is nice for identifying who else is in the room. Unless there is time to go meet those people, this largely wastes time. Some instructors send out a survey of what we want to learn. This allows us to spend more class time actually learning. Please either tell people that graduation photos won't be available until Tuesday or have them available on Friday. For my events, our photographer can turn a gallery by that evening. You could email the link out the next morning so we get it during class. Then our press release could go out in a more timely manner. The cafeteria food is terrible. Even instructors talk about it. We'd gladly have paid more to gotten food delivered or eaten off-site. (or had better cafeteria food) I'm guessing the hotel requires you to get their food so maybe focus on requiring them to serve better food. Give local restaurants a heads up about class dinners so they can staff accordingly. Ideally, have the class advisor contact the restaurant where their class is having dinner a week or so out. Restaurants are always struggling to get everyone served in a timely manner. It would be nice to do something centered around AthFest. Maybe a non-required social activity before things get started on Sunday. Everyone was very nice. The IOM was a great experience. There were stories of classmates being told our class would not be invited back in any role after graduation. I have to believe that wasn't a serious statement. Similarly, there were stories of lower level classes putting down purses to save seats while we were doing photos. The rumor is that someone ordered all their personal items to be collected because the people weren't supposed to save seats. There is no need for rules to be followed that closely. How exciting that they had a group that they wanted to sit with during the event! Overall, the IOM was great. Lots of great connections. I'll miss being part of this event."
- I liked the Monday night dinner but I did hear some say they would like a more affordable option if they're having to pay for themselves or their chamber has a tighter budget. For just me it was over \$50, add parking, and morning breakfast to each day and it does add up. It was so quick after first day of class to go back to hotel and get dressed and then get to restaurant too. No down time after a huge first day. Maybe if it's required to attend then maybe do at hotel site and add onto institute fee.....just a thought.
- Institute was amazing on so many levels! I can't wait to attend next year at UGA!



2019 BOARD OF REGENTS

CHAIR

Tony Felker, IOM, CCE

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2019 BOARD OF REGENTS

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WEST

2019 BOARD OF REGENTS

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Term: 2016-2020



AGENDA

OCTOBER 4, 2019

10:15 A.M. – 12:00 P.M. EDT

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

- | | | |
|------|--|-------------------------------|
| I. | Welcome and Introductions | Tony Felker, IOM, CCE |
| II. | Approval of Minutes | Tony Felker, IOM, CCE |
| III. | Institute Staff Update | Institute Staff |
| | A. Program Updates and Looking Ahead | |
| IV. | Nominating Committee Report | Ryan Evans, IOM |
| V. | Analysis of 2019 West Institute | Board Members/Institute Staff |
| | A. Final Enrollment Report | |
| | B. Survey Results and Discussion of Institute Week | |
| VI. | 2020 West Institute | Ryan Evans, IOM |
| | A. Create 2-3 Strategic Goals | |
| | B. Discussion of Week/Assign Regent Responsibilities | |
| VII. | Other Business/Adjournment | Tony Felker, IOM, CCE |

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

MINUTES
JULY 17, 2019
11:30 A.M. PDT
BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

In attendance: Tony Felker, IOM, CCE; Ryan Evans, IOM; Brad Lacy, IOM, CCE; Juliet Abdel, IOM; Jason Camis, IOM; Lisa Hermes, IOM, CCE; Jim Johnson, IOM; Kelle Marsalis, IOM, CCE; Erica Mulder, IOM; Robert Newman, IOM, CAE; Jennifer Reiser, IOM, CCE; Kuma Roberts, IOM; Katie Stice, IOM, ACE; Gene Terry, IOM, CAE; Matthew Ferraro, IOM; Dexter Freeman, IOM; Shontel Mays, IOM; Yvonne Pickering, IOM; Karyn K. MacRae, IOM, CAE, CMP; Katelynne G. Cox; Mandy Pan

I. Welcome and Introductions

Tony Felker, IOM, CCE welcomed everyone to the meeting and introductions were made.

II. Staff Updates and Week Overview

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

III. Photos and Joint Lunch

A group photo was taken and participants caught up over lunch.

IV. Class Advisor Responsibilities

Specific Class Advisor responsibilities were discussed in detail. The first Class Advisor Broadcast was reviewed with the group and questions were answered. The role of the Regent Partner was also reviewed.

V. Other Business and Class Advisor Adjournment

Additional Class Advisor business was discussed prior to advisors being dismissed.

VI. Board of Regents Business

- Approval of minutes
 - The minutes from the May 20, 2019 conference call were approved with no changes.
- On-site regent responsibilities
 - Regent roles and expectations during the Institute week were explained. This included, but was not limited to: information on when to arrive at University Hall every day; how they should network with attendees during meals and social functions; after-hours interaction with attendees; what to do while attendees are in class, etc.

MINUTES
JULY 17, 2019
11:30 A.M. PDT
BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

- Visiting Homeroom
 - Regents discussed the possibility of visiting each Homeroom.
- Importance of fundraising
 - The group was reminded of the various ways to fundraise and that all funds raised on-site go to Institute scholarships.
- Additional business and adjournment
 - Any remaining business was discussed prior to adjourning the meeting.

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



WEST

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

2020 SCHEDULE OF ACTIVITIES

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

Wednesday, July 15

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

Board of Regents & Class Advisor Briefing: University Hall, 3999
Registration: University Hall, East Atrium
LMU Housing Check-in: Xavier Hall, Room 112
Tour: University Hall East Atrium
Graduation Rehearsal (*4th year participants*): University Hall
Homeroom: University Hall, Individual Classrooms
Institute Kickoff: University Hall, Auditorium

Thursday, July 16

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

Registration: Institute Office, University Hall, 1857
Core Classes: University Hall, Individual Classrooms (*Break: 9:30–10:00 a.m.*)
Lunch: University Hall, East Atrium
Core Classes: University Hall, Individual Classrooms (*Break: 2:00–2:30 p.m.*)
Class Advisor Meeting: Faculty/Regent Office, University Hall, 1857
Elective Classes: University Hall, Individual Classrooms
Class Dinners

Friday, July 17

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

Elective Classes: University Hall, Individual Classrooms (*Break: 10:00–10:30 a.m.*)
Elective Classes: University Hall, Individual Classrooms
Board of Regents Meeting: Faculty/Regent Office, University Hall, 1857
Lunch: University Hall, East Atrium
Core Classes: University Hall, Individual Classrooms (*Break: 3:00–3:30 p.m.*)
Class Advisor Meeting: Faculty/Regent Office, University Hall, 1857

Saturday, July 18

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

Core Classes: University Hall, Individual Classrooms (*Break: 9:30–10:00 a.m.*)
Class Advisor Meeting: Faculty/Regent Office, University Hall, 1857
Lunch: University Hall East Atrium
Core Classes: University Hall, Individual Classrooms (*Break: 2:00–2:30 p.m.*)
Graduation Ceremony and Big Bash: TBD

Sunday, July 19

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

Core Classes: University Hall, Individual Classrooms (*Break: 9:30–10:00 a.m.*)
Class Advisor Meeting: Faculty/Regent Office, University Hall, 1857
Board of Regents Meeting: Faculty/Regent Office, University Hall, 1857
2020 West Institute Concludes



WEST

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

2020 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

Class Advisors

Lisa Hermes

Silent Auction/Fundraising

1. _____

2. _____

3. _____

4. _____

Industry Consultations

1. _____

2. _____

Scholarships

1. _____

2. _____

3. _____

Opening Welcome

1. _____

2. _____

3. _____

Graduation Ceremony and Big Bash

1. _____

2. _____

3. _____

State Photos

1. _____

2. _____

Lunch Roundtable Discussions

1. _____

2. _____

Volunteer/Faculty/Staff Dinner

1. _____

Social Media Strategy (Optional)

1. _____

2. _____



WEST

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

GEOGRAPHIC BREAKDOWN

2019 West Institute

104 Attendees from 26 states, the District of Columbia, and Lagos

State, Number of Attendees, %

Alaska,	1,	0.96%	Missouri,	1,	0.96%
Arkansas,	9,	8.65%	Montana,	2,	1.92%
California,	19,	18.27%	Ohio,	1,	0.96%
Colorado,	4,	3.85%	Oklahoma,	3,	2.88%
District of Columbia,	6,	5.77%	Oregon,	2,	1.92%
Florida,	4,	3.85%	Pennsylvania,	1,	0.96%
Illinois,	2,	1.92%	South Carolina	3,	2.88%
Indiana,	1,	0.96%	South Dakota,	2,	1.92%
Iowa,	4,	3.85%	Tennessee,	1,	0.96%
Kansas,	2,	2.88%	Texas,	23,	22.12%
Kentucky,	2,	1.92%	Utah	1,	0.96%
Lagos	1,	0.96%	Virginia,	1,	0.96%
Louisiana,	3,	2.88%	Washington,	1,	0.96%
Maryland,	1,	0.96%	Wyoming,	3,	2.88%

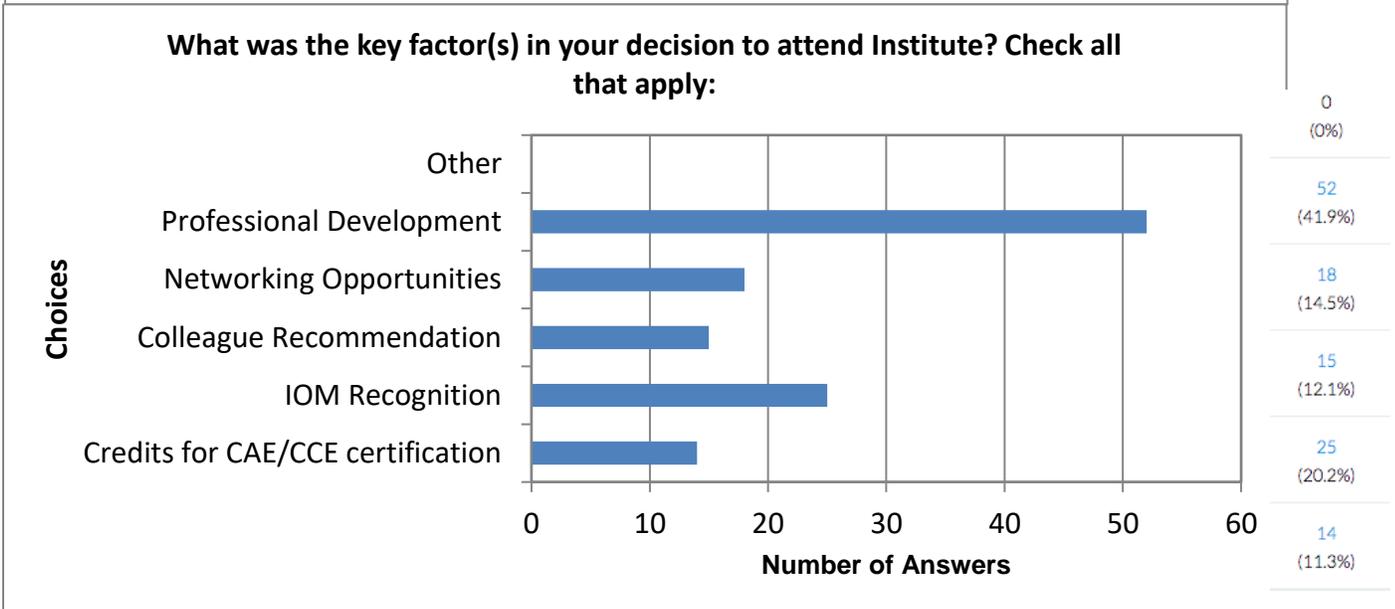
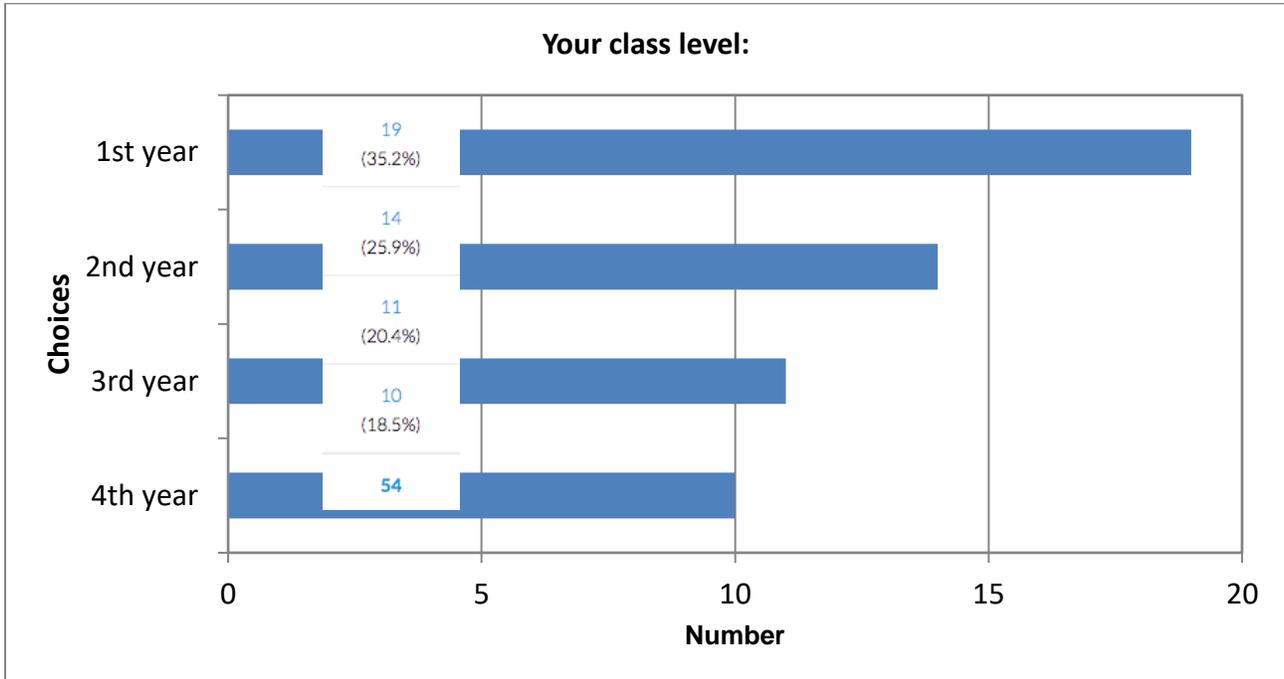
Top Increases Since 2018:

Florida	+3
Louisiana	+3
South Carolina	+3

Most Attendees in 2018, Texas with 25

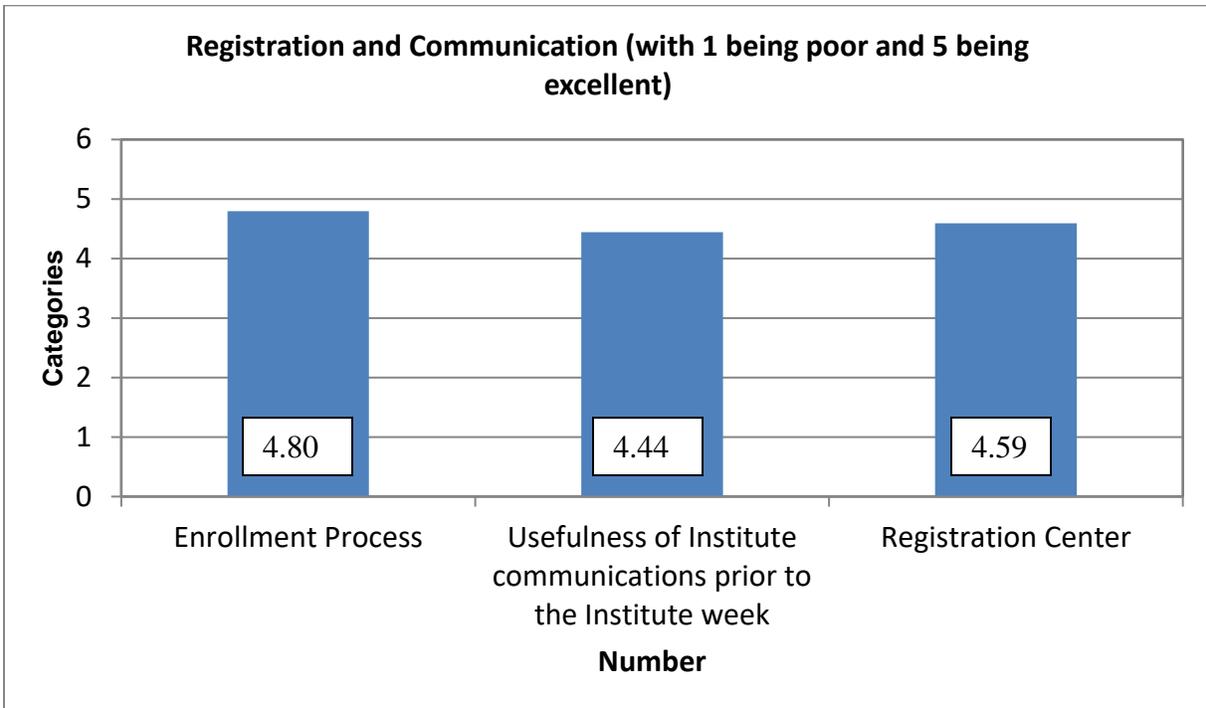
Most Attendees in 2019, Texas with 23

ATTENDEE SURVEY RESULTS AND FEEDBACK



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

ATTENDEE SURVEY RESULTS AND FEEDBACK



Q4: Additional comments about registration and communication*:

- First year students need more detailed communication. This is brand new information for us and we do not talk the talk yet. It would have been nice to have a the week detailed out more.
- I had registered later in the process so I had missed a lot of the emails about events and from the instructors. May want to send updated lists closer to the date so later registrations still get communications. I know there were a few of us in that situation.
- I really do not think that we should have been required to attend the first night. While I enjoyed connecting with folks, it could have been handled the next morning. Start us earlier instead.
- Registration was easy, however, I would have liked to have had more information about the shuttle to and from the hotel in advance. I did not know until a few days before the event that we would be shuttled and it was only because I explored the app once I downloaded it. A more detailed schedule would have been helpful for planning out daily activities as well.
- I don't remember seeing any information on the parking garages and that would be useful info for those driving.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- When I emailed about registration questions, I received replies quickly with useful information. The emails from our class rep, [removed] was helpful and timely as well. The registration process was a little disorganized. I was one of the first to register at 2:30 when I was told it opened. The greeters were friendly, however not ready to begin on time. I was not told where homeroom was until I asked someone else. I was told the wrong room and missed the tour given and almost missed the homeroom at 4pm because I was waiting on the wrong floor. That was frustrating to me. I feel there should have been a handout with times, room numbers etc.
- Being 1st year, more communication about what to expect and what to wear, etc. I know the link said to wear anything from shorts to business casual. That's a wide range and most people were more casual than expected.
- I didn't know there was a shuttle between the hotel and LMU...communication on that was not clear.
- I felt like going into this being a first year, the only thing that could have been better communicated was exactly what we needed for each core class. For example: the email we got said that we needed info about our form 990. Really, we need to bring a printed copy of pages 1-12 of our 990. Being specific about that part helps to eliminate us finding ourselves without a printout of our 990, and trying to create an account on guidestar, and having to read all that info on our phones.
- Hard to find where to register for housing.
- The enrollment process is fairly easy. I would like to be able to log into one service center (not different attendee service centers for different sites/years, which seems to be the case) to view invoices/receipts for payment, transcripts, etc. As a 4th-year, the level of pre-site communications generally seems not useful - not because they don't contain information, but because there are SO many emails that contain info I already know. Actually, this is really in regard to class email groups. It would be great if class advisors could preemptively create a groupme or the like so that inboxes aren't filled with incessant emails about choosing the class speaker/dinner location/etc.

ATTENDEE SURVEY RESULTS AND FEEDBACK



Q6: Additional comments about customer service*:

- All the staff was helpful. The board was great. [Removed] overheard me talking one day and he came up and said put that on the survey, i will be looking at the comments. I thought that was a great way to connect with the students and shows he wants to make it the best experience.
- Board of Regents were very friendly and helpful. Our class dinner could have been better planned. It was a lot of money and hassle for food that was fine... but not worth \$75 and getting back so late because of the process of paying being so poor. We were told drinks were included so the price seemed not bad, but then they were not and the portions small.
- Loved [removed]!
- I took the tour and it was fantastic. The Board of Regents were especially impressive!
- The staff, advisors and regents were friendly and helpful throughout the session. I stayed in the dorm which was a whole experience in its own.
- All service was excellent, you do a great job.
- Our particular class advisor did a great job of sending us info before the week of institute, but once we were onsite, she didn't have all the info so a lot of times when she would give us daily updates we would ask questions and she would have to go find out and then we would know last minute. I would have liked for her to be a little more personable and connect with the class. I didn't feel like she really had much of a connection with any of us.
- [Removed] did a good job - I think she was uncomfortable at times in the spotlight/in person. Information she conveyed through email was great. Having a first year class member coordinate our class dinner was not great, probably ending up costing many out of pocket expenses because it couldn't be well explained to the company.
- Everyone was very friendly and helpful once we arrived! I do not have anything negative to say about the staff.

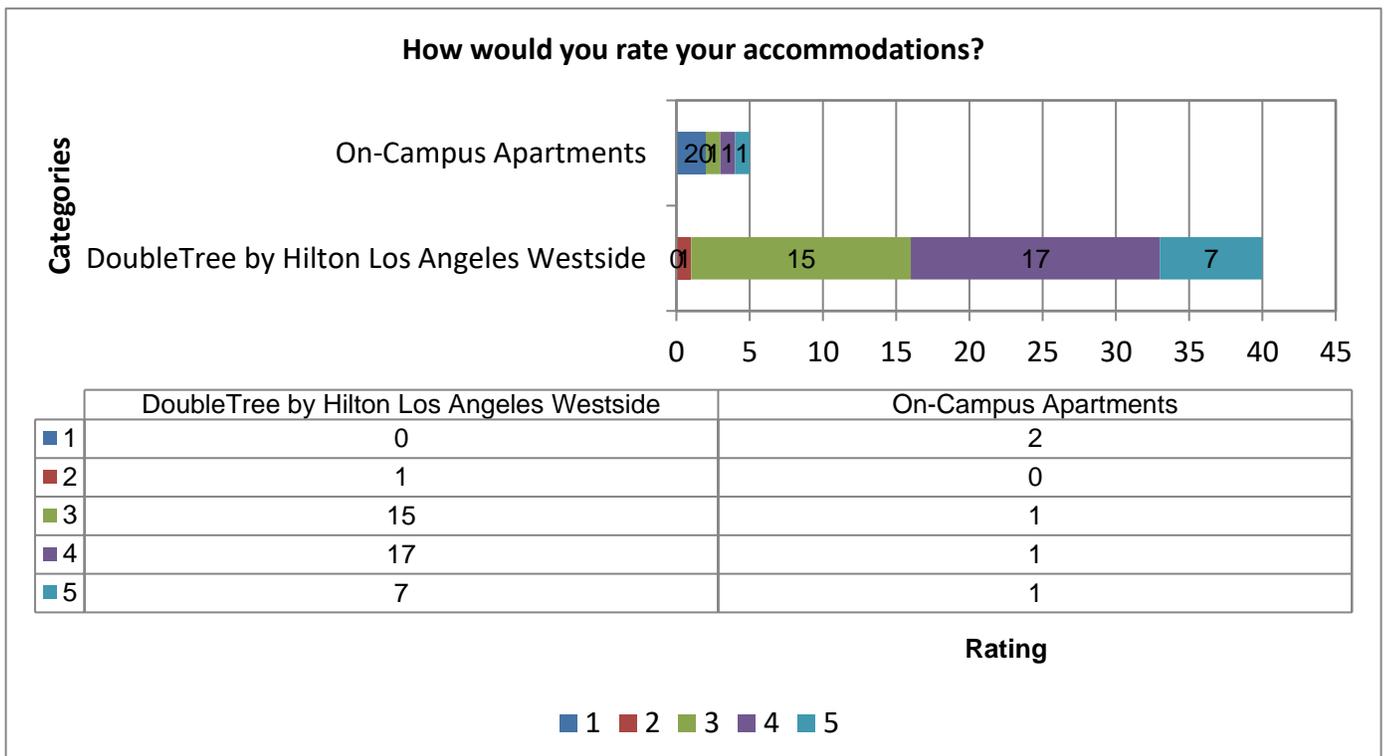
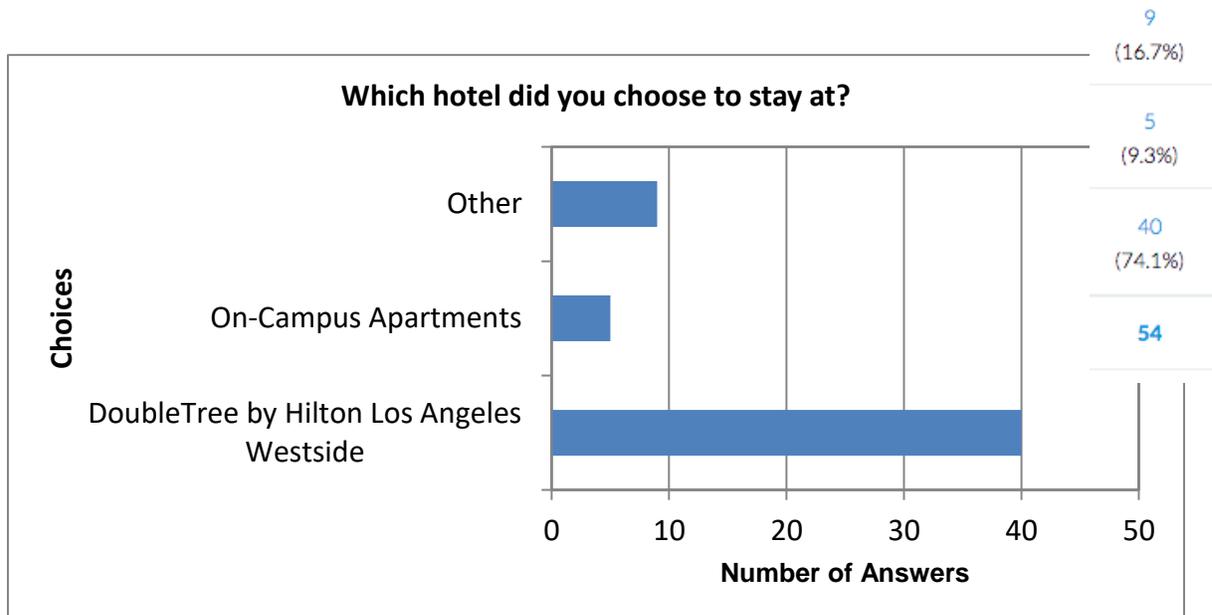
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WEST

ATTENDEE SURVEY RESULTS AND FEEDBACK

- [Removed] was awesome!
- The hotel was not great. The elevators were broken and a little dirty- not worth the price.
- Communication by advisor was a bit vague at times.



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ATTENDEE SURVEY RESULTS AND FEEDBACK

	1	2	3	4	5	N/A	
On-Campus Apartments	2 (6.7%)	0 (0%)	1 (3.3%)	1 (3.3%)	1 (3.3%)	25 (83.3%)	30
DoubleTree by Hilton Los Angeles Westside	0 (0%)	1 (2%)	15 (29.4%)	17 (33.3%)	7 (13.7%)	11 (21.6%)	51
Totals	2	1	16	18	8	36	81

Q9: Additional comments about accommodations*:

- The hotel was a bit worn and tired, but it did the job.
- My room would not cool.
- Bad room karma, various guests in room next to mine, loud in the middle of the night, very thin walls.
- Personally, I find the dorms to be fine (especially when the weather is cool like it was this time!). I would add something to your pre-Institute email to those staying on campus to mention what the sheets/pillow are like. I'm fine without a fan etc. but having a pillow from home makes an immense difference.
- I always enjoyed staying in the dorms. I felt sorry for the 1st year because no one gave them the heads up about the "paper sheets" and the need to bring their own, plus their own towels and a fan.
- The hotel in LA 2 years ago was very nice. Last year and this year they have not been nearly as good.
- Hotel is looking worn/older. Maybe better hotel next year.
- Location was convenient...but, hotel was substandard.
- Appreciate the transportation back and forth from the university to the hotel - well done!
- Location was good, not too far from campus. The elevator was broken one day, and the rooms were a little rundown and were expensive compared to the super nice, recently updated Hyatt we stayed at in Long Beach for ACCE. I would love to have a nicer hotel, even if it means driving an extra 10 minutes to get to class. Can I just say that your bus drivers were PHENOMENAL?! They were the nicest people in the world!! And clean buses. And they were always on time. Just Big Big kudos to them.
- For \$200 a night the hotel could have been better. My room had a leaking toilet, a stain on the ceiling, the air wasn't working the first day. The room was not properly cleaned. Very disappointed in the Doubletree. The Hyatt was \$215 a night and looked to be much better of a property.

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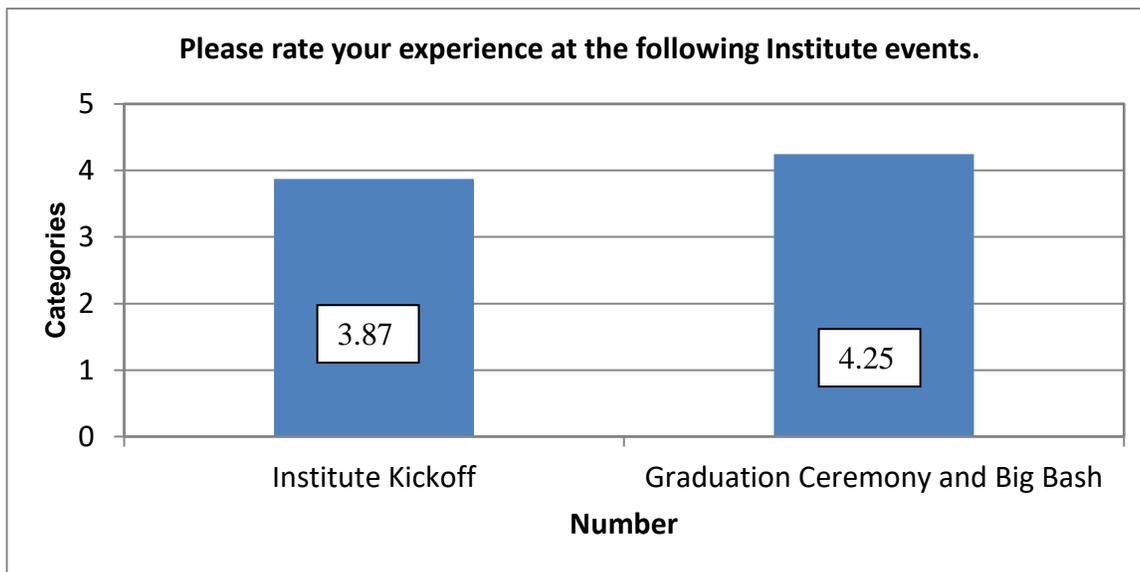
ATTENDEE SURVEY RESULTS AND FEEDBACK

- I would like to have a hotel that is closer to restaurants and grocery stores since I do not have a car.
- Bathroom needs work.
- The hotel was fine, I would suggest moving us to a location that allows for hotel and instruction to occur in the same place. I would pay more per night if we did not have to get in a bus. Take that money spent on transportation and move us to UCLA or another campus with a more conducive connection. Its wasteful and inefficient.
- The DoubleTree was nice, however, it was not close to any coffee shops or restaurants. The rooms were not as nice as I expected them to be for the price. There was a leak in my bathroom at one point as well and I heard that I was not the only one with a problem such as this. However, the food at the hotel was very good and the service was excellent.
- Apartment was well located and fun to be with other attendees but the cleanliness was third world. Mildew and calcified yuck on showers, sheets are not professional standard. My advice is to insist that people bring their own sheets-not a option!
- I arrived at Xavier Hall to check in to the dorms. They could not find my reservation, then when they did said I had not paid. Thankfully, I had a copy of the registration and the check my Chamber paid with. After getting that dealt with I was basically told my dorm was " Over that way" with a hand gesture. This was a 25 minute process, so I am glad I did not have a cab waiting for me! I walked with my suitcase (my own choosing to not have the cab wait) in search of my room. I finally found someone that I asked and was told how to get to my room. When I arrived at the room there was blue painters tape on the door that had marked, Bath not done. The lock was taped open so my card was not necessary. I called to check in and asked and was told that they would send maintenance to check on it. The suite was filthy with construction debris on the floor and the bath not clean. I took photos of the shower, floor and carpet should you want to see them. When maintenance came, he said everything was done and took off the tape to the door. We tested the card to make sure I could get in and left without even looking at the bath based on the note taped to the door. I walked into my room to find the sheets I paid \$20 for were no more than the thickness of papertowels. I know that an email stated I could bring my own, however, I had no idea I would get paper sheets. The bed was so hard that it was difficult to even get comfortable. More information here would be helpful to those in the future. In the end, I was able to connect with other 1st years that stayed on campus and it worked out. It is definitely convenient to be there on campus. My suggestion is to make it very clear to the school that the rooms need to be clean and ready and that email correspondence to those staying are very clear as to they type of sheets you get and the strong recommendation to either bring your own stuff or go to target when you arrive.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- No airport shuttle, price point didn't offer value - could have stayed elsewhere with better experience for the price, not really a walkable area - had to Uber everywhere. Classmates are discussing airbnb for next year.
- The hotel was fine, I didn't have any issues. One comment was elevators were slow when bus arrived, people had to wait for 2 to 3 elevators.



Q11: Additional comments about events*:

- Slamming of the beach balls in the crowd was a little much. Graduation-I was a little sad about the ceremony not being held at the yacht club, but it was a wonderful experience and I really enjoyed it and felt like it was more personal. Great Choice to move it on campus.
- Having the ceremony outside had one drawback - it was too cold. I left on the early bus because i wanted to warm up.
- Didn't attend the Graduation Ceremony, I didn't like the idea that it was there at the campus mainly because we are there for almost a whole week.
- Dinner and ceremony at graduation/big bash was great. However, missed being off campus and near the beautiful water, it was too dark after sunset, and bathrooms were too far away.
- Too cold, and later, dark outside.
- It would be nice to have the Big Bash off campus. The Yacht Club in the past was nice due to the unique views.

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



ATTENDEE SURVEY RESULTS AND FEEDBACK

- No one I spoke to realized the Big Bash and graduation would be outside. I would have worn something completely different. It wasn't enjoyable at all because of how COLD we all were. The food wasn't good at all either and was cold. I don't know where else to put this... we had someone who was deathly allergic to seafood and yet we had salmon for lunch one day. She could have died. You have to pay more attention to peoples allergies. Also, I would have loved to have had some protein at breakfast instead of pastries and fruit for both breakfast and snack. They were very good.. just wanted some more variety in choices.
- The kickoff in my opinion was very unprofessional. Many of us were excited to see each other again and were catching up while some of us were also dragging a little from a day of travel only to be met with beach balls being hailed at us. I'm attending a professional growth event and getting pegged in the face with a ball over and over was less than professional. We tried sitting in the back to avoid the situation but were asked by staff to sit up front. I realize that the staff were trying to make the event energetic and fun but there are better ways to do it. The graduation was great and everything looked amazing. We were hesitant that graduation had been moved from the previous location but I thought it was a lovely event and well executed. The lighting could have been better but overall it was great and I enjoyed it.
- Food at bash tasty, I would prefer Wednesday full day and no half day after the bash night.
- 1. Insufficient lighting at graduation. 2. restrooms too far away. 3. No cc accepted by bar - even though it was communicated that credit cards were accepted. 4. Graduating class picture, should have been done on the steps, some of the participants are not in picture/blocked.
- The kick-off was fun, but pricey and there wasn't enough food. I enjoyed the campus evening event for graduation.
- Kickoff - I usually don't get much out of it. Good that it is short. That said, it would be nice if we could do this later in the evening (6pm?) or else the first morning, to cut down on a day lost to travel the day before. Graduation - the campus location was beautiful. Given CA weather, I would recommend finding an indoor or semi-indoor (screened-in porch type venue, or indoor with an outdoor dance floor) because every year it's hot/cold/windy all at once.
- It got dark and there were no lights to support.
- I hate to say make this mandatory, but I think everyone would really enjoy this. You don't have to make people bowl, but if there was an actual meal or more food I think everyone would like it. I thought it was a lot of fun. Also, if you could include the price in the total Institute that would be helpful. Most people don't carry cash and those attending that aren't executives, don't have access to pay or possibly get it reimbursed.
- The bowling event was a bit loud to get to know people, and for those of us that arrived a little after the first round of food we had to wait for a very long time for more food to come out!
- Being from Texas, it was quite chilly outside for the big bash. Outdoor (patio) heaters would be a nice addition.
- Kick-off kind of wasted time. better to have a session for credit or add it in. Big Bash venue not so good. A/V was lacking and taking pictures into the sun is a common knowledge no-no.
- The graduation itself was nice but the venue is not the best. There was a lot of dead time before dinner was served, the bars only took cash and the the bathrooms were way too far away.
- DJ was fun!

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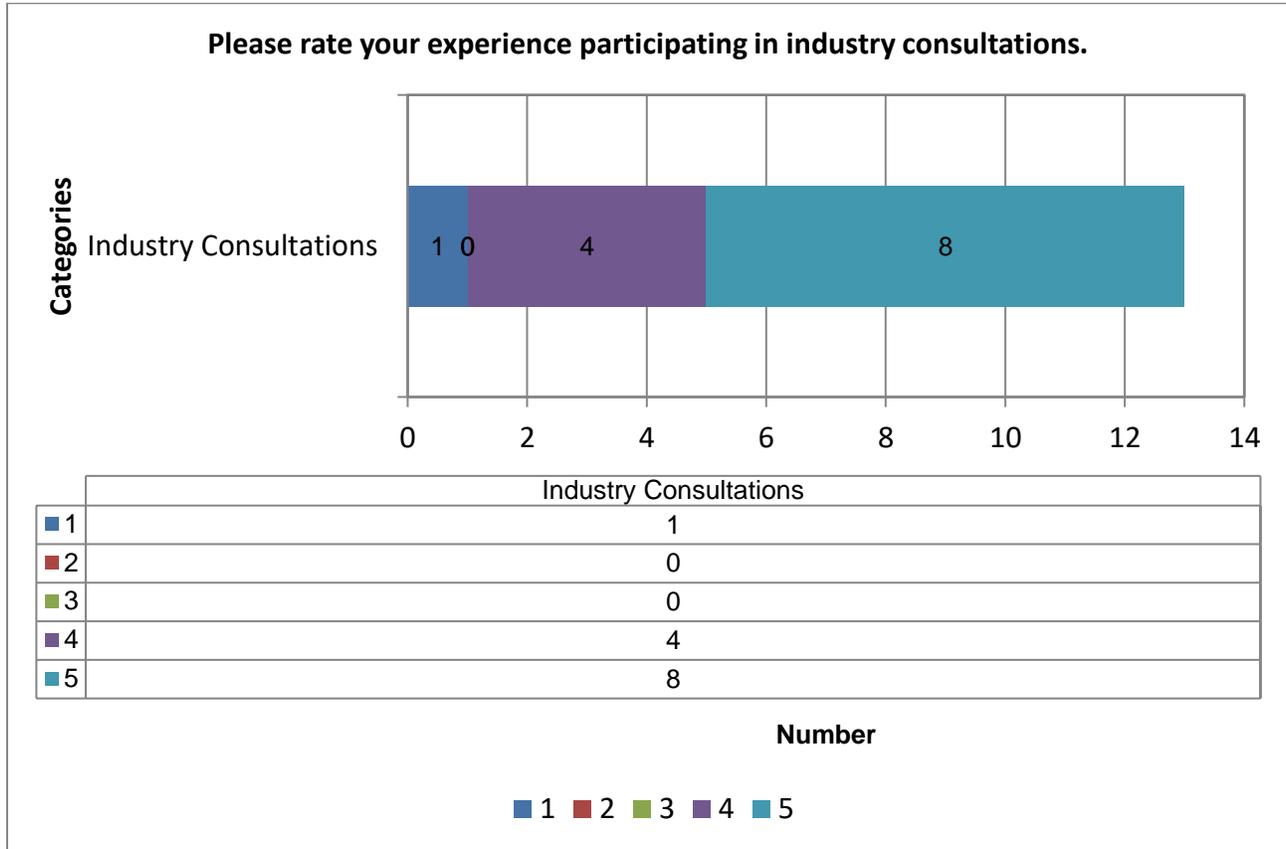


ATTENDEE SURVEY RESULTS AND FEEDBACK

- Kick off was a bit unorganized...we didn't know what we were supposed to do. Big Bash was nice outdoors, but, it was very dark. Maybe face a different direction and closer to more lighting. We were facing the sun when it was going down.
- The grad ceremony was really wonderful, minus the food. It was chilly (which I know can't be helped) but the food was really cold and not many people at my table ate it. Especially because we had just had chicken and broccolini for lunch that same day.
- Kickoff was great. Big bash:
 - It was cold, there should have been heaters.
 - The location of the bathrooms was very inconvenient.
 - Food was disgusting (chicken was served at lunch that day and should not have been served again a few hours later.) So many people went and got food after the event.
 - If hosting an event outside and on grass that should be communicated ahead of time. This would allow your guests to pack accordingly. A coat, wrap etc if it is cold and for ladies they may not want to wear heels with the grass.
- The Big Bash was outside and it was cold. They did the auction when it was getting dark so seeing everything was difficult. Some heaters/lights might have helped.
- I did not go to the big bash because I had been at the university all week. I would more likely go to the big bash if it was off site.
- Bowling is a harder activity to meet people for those attending the first time. The Ceremony should be inside with lights, closer bathrooms and not so cold. Just a suggestion, can we kill the Chamber chicken for this event? I would like to resend it's invitation.
- The bowling was fun but could have occurred another night. The session following check in was silly and wasteful. None of us like to waste our time and that's exactly what it was.
- The Institute Kickoff was great! The Big Bash was fun, however the food was not great and it was much colder than I think any of us expected. A head's up in advance that the Big Bash was going to be outside, would have helped us prepare with appropriate clothing. I did not know it would be outdoors until the day of the event.
- What is the benefit of having beach balls thrown at your head for 15 minutes? This does not feel professional. Great job with Big Bash-it was absolutely beautiful.
- Kickoff was lacking food. We paid expecting to get food and there were barely any options and it was hard to even get some food.
- The kickoff in the auditorium was good. It was good to see that the staff and regents are so committed to this program and really interested in the success of the students. The big bash was nice being on campus as I could just walk back to my room, however the bathrooms were pretty far away and I heard alot of complaints about that. The food was good and the wait staff efficient and friendly.
- Maybe have the stage facing to the west so people can see the graduates and offers better photos Also maybe have a few tall propane heaters or blankets, I noticed several women that were cold. (Even though you reminded them to bring sweaters and coats.)
- Loved the beach balls and fun kickoff. I like having a free evening after travel, prior to a long day of class. The bash was fun and while it wasn't the great marina spot, it was a good alternative. It would have been nice to have lighting when it got dark.

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ATTENDEE SURVEY RESULTS AND FEEDBACK



Answer Category	Choices						Totals
	1	2	3	4	5	N/A	
Industry Consultations	1 (1.9%)	0 (0%)	0 (0%)	4 (7.4%)	8 (14.8%)	41 (75.9%)	54
Totals	1	0	0	4	8	41	54

Q13: Additional comments about industry consultations*:

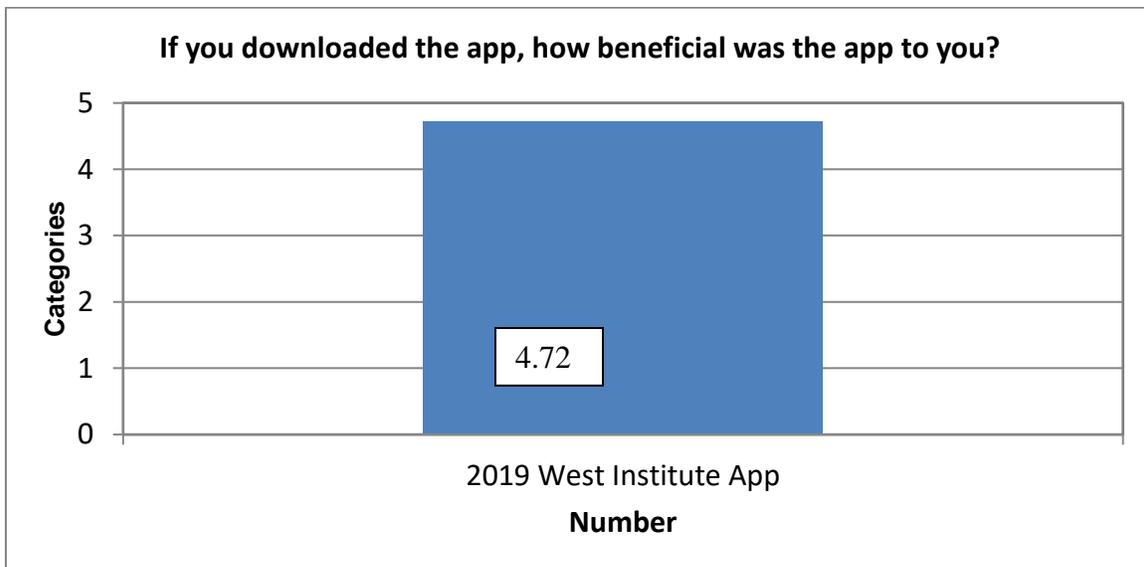
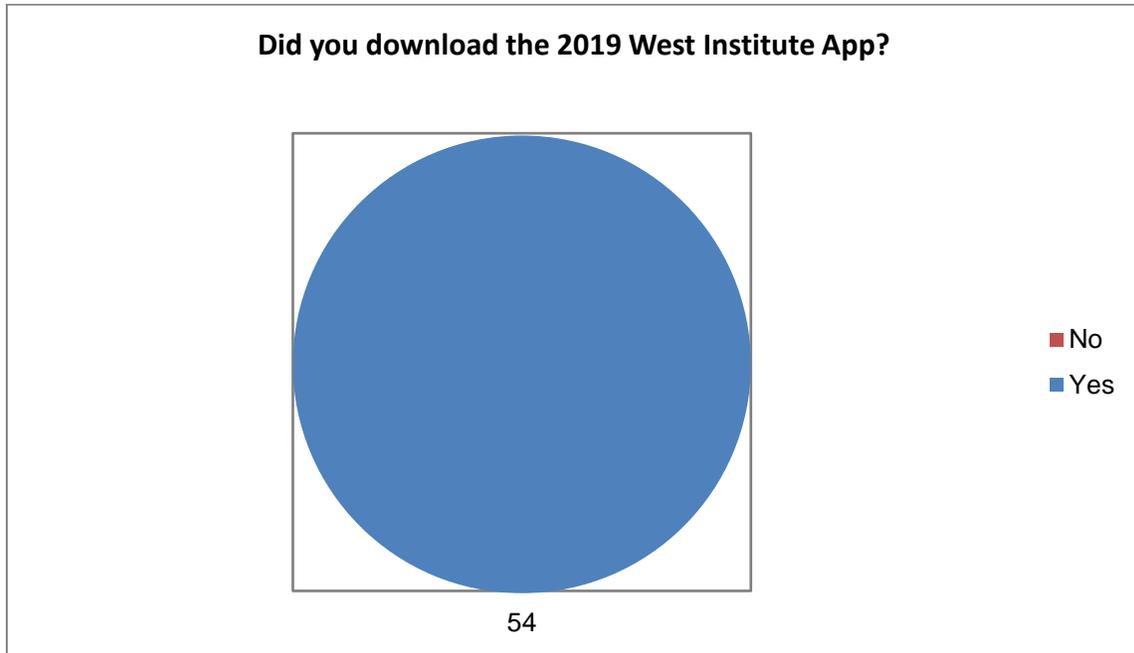
- This wasn't made very clear about what they were and how to get involved.
- I love that this is an option for us. I think it's important to consult the specialists, even if it's just in general conversation. Thank you for offering this! My meeting with [removed] was insightful and very much appreciated.
- My industry consultation was incredible. It was a major light bulb moment for me and I'd recommend anyone with an issue or concern utilize them.

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



ATTENDEE SURVEY RESULTS AND FEEDBACK

- [Removed] was GREAT! [Removed] was also very good. Some of the others were not.
- [Removed] is the BOMB.
- So glad he was invited to West.
- Did not participate.



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ATTENDEE SURVEY RESULTS AND FEEDBACK

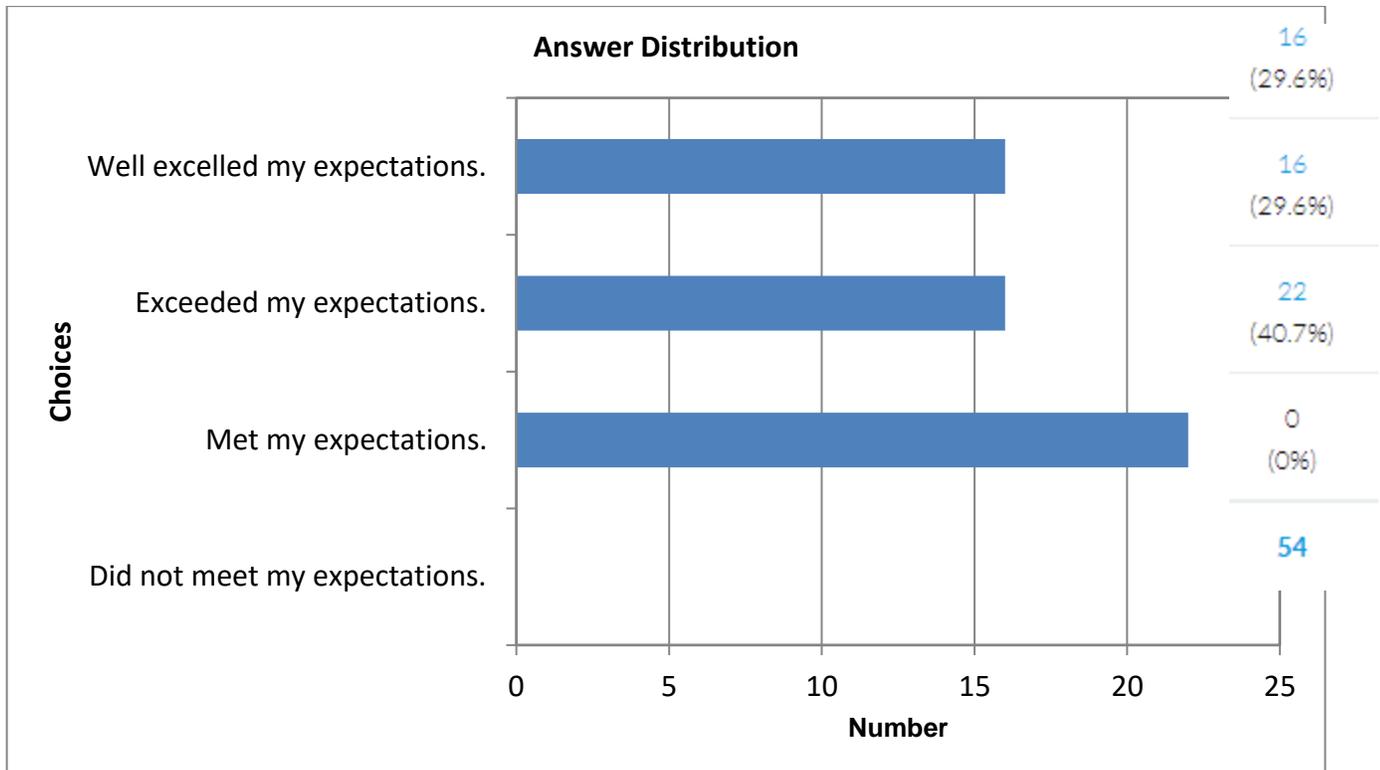
Q16: Additional comments about the app*:

- App was nice...a few suggestions:
 - Put class lists in the app for elective courses. There were a few times we got talking in class but I did not know who the person was but wanted to follow up on the conversation so would have like to open up the class and see who was in there and find them by their photo.
 - Be able to search the app by state and association/chamber.
- Love the app.
- Easily able to reference the powerpoints and schedule which was very helpful.
- Would have been helpful to have instructor materials available prior to the start of Institute.
- I didn't like that you had to have the verification code everytime you went to the site on your lap top.
- I referred to the app several times a day while attending IOM. I can't think of any improvements to be made.
- The information in the app and the material that was sent to us did not always say the same thing.
- Having all the information at my fingertips was very helpful.
- Worked great.
- I relied entirely on the app.
- Great to have schedule info and course evals in one place. Otherwise I don't use the app for anything.
- Loved this app more than the one in the previous years.
- App was AMAZING! So beneficial!!!
- The app was FANTASTIC. There is nothing I would change about the app. It was a lifesaver for me, and having everything all in one place was so easy!
- I saw the app less beneficial and more required. It would be helpful if the instructions to download the app came early in the communication process. I didn't realize/understand that it would be required during the process (reviews, room numbers, general info) and didn't download until I arrived.
- It was fine, except that I had to log in often. Likely a tech issue but it made me use it less.
- LOVED having everything in my hand/phone. Not a fan of unnecessary paper. Easy to use. Enjoyed being able to see materials from other courses.
- The App was really helpful for keeping up with the schedule, changing electives, etc. It also helped to have the shuttle schedule on the app.
- It was beneficial in being able to see the schedule and download the presentations so I could email them to myself. A phone is too small to effectively see the files though. Communicating with others through the app would be better/funner if more people used it.
- I used the app for instructor ratings and to check schedule.

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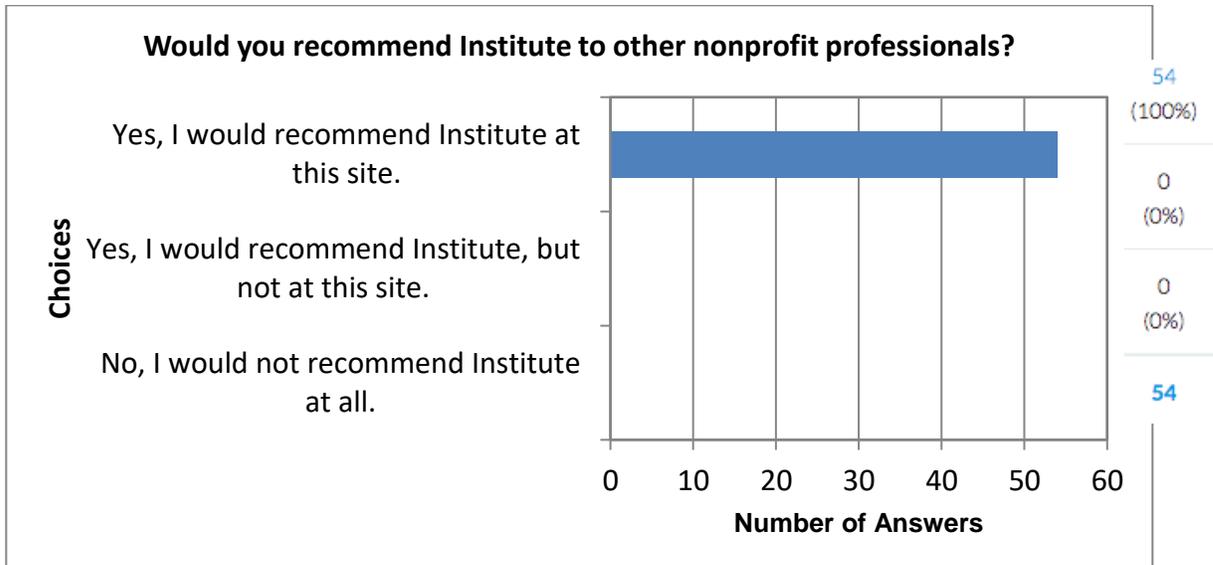
ATTENDEE SURVEY RESULTS AND FEEDBACK

Answer Category	Choices					Totals
	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	
The Institute curriculum provided valuable professional development.	0 (0%)	0 (0%)	1 (1.9%)	24 (44.4%)	29 (53.7%)	54
The Institute courses were conducted at a suitably challenging level for me.	1 (1.9%)	4 (7.4%)	6 (11.1%)	22 (40.7%)	21 (38.9%)	54
Institute provides a good networking opportunity in nonprofit management.	0 (0%)	0 (0%)	2 (3.7%)	21 (38.9%)	31 (57.4%)	54
Totals	1	4	9	67	81	162



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ATTENDEE SURVEY RESULTS AND FEEDBACK



Q20: Additional general comments*:

- These are long days of using the brain and I'd prefer a heartier breakfast with some hot and protein options.
- West is BEST and I love this location! Curriculum is great, but some instructors needed to include associations in their content since a couple classes were irrelevant to association groups. [Removed] was an amazing speaker and instructor! Please have graduation off campus and near the water. The yacht club was beautiful!
- It's challenging to sit for extended periods of time like that and can make the day very long, especially when there are evening events going on as well. I'd recommend implementing some 15 min breaks if possible.
- The food was absolutely horrible.
- I would not recommend our class advisor again. She was unprofessional numerous times. I thought the way she dressed one day was inappropriate for a class advisor. We had a terrible time checking out at our class restaurant, but she behaved badly. She was yelling and cussing at the manager and telling him they were incompetent.
- Many of the courses I took this year, I had previously taken. I do appreciate hearing some of the information again and have even chosen to take [removed] course 3 times due to the value of the information but there were a few electives that seemed redundant to required courses. Several instructors started off by saying "I know you probably heard this earlier". So while the courses could have been a little more challenging, overall I still took away a wealth of information and felt that the program was of great benefit and helped me grow. I would recommend it to other chamber executives and plan to send one of my staff next year.
- I like the structured curriculum, IOM staff very friendly, helpful and supportive. As noted earlier, would prefer first day to be full day, end IOM after the bash event.

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



ATTENDEE SURVEY RESULTS AND FEEDBACK

- Please please please get some diversity amongst your instructors. I didn't have one instructor of color. This really does matter. Diversity, Equity & Inclusion session. I was not aware that this session was solely going to focus on the LGBT community. I think it would've been helpful if we had covered the Latino and African American communities and what's being done to bring more of these businesses into the fold. Also, the instructor really wanted to make it known that he is a gay man. That's fine and all. But to insinuate the class attendance was small because people didn't want to hear about a gay chamber from a gay man is being very unfair to folks, especially if he's assuming this is the reason. If he really wants to be taken seriously, quit the name calling. And, don't spend two hours reminding us you're a gay man. We know this. Speak more of your business service to the gay community. Again, have this session be more well rounded, balanced. Admittedly, I was disappointed this was all he presented on. We're trying so hard to increase racial diversity within our chamber. Conversations on this would have been helpful. Here's where having more instructors of color will be helpful. [removed]??, the board member, would have been a fantastic speaker on DEI. Keep in mind though, there are just as many qualified professionals throughout the country who can speak to. Bringing more in will help to increase this institute's diversity. I thoroughly enjoyed being at this site. The weather was wonderful! I enjoyed my experience all week. Everyone was helpful. Is it possible to have the big bash wrap up that particular week of institute? Instead of having that one class on the last day, could we put it on the front end instead? Have homeroom then a core class? This is my second year in institute. This year and last there were folks dragging in, if they showed up at all, because they partied hard at the bash the night before. Let the bash close out the week. Besides, three hours in that marketing class waiting for 11:30 to come was brutal! Thank you again for a great experience. See you next year!
- Please work on redesigning the curriculum to 1) avoid duplication between core and elective classes and 2) make classes more intellectually rigorous. So many classes ARE good quality, but they are based wholly on a person's individual experience. That experience is useful to hear and was delivered well in every class I attended this year, but it feels very limited and situation-specific. More time spent discussing theoretical concepts/reasons WHY something matters/frameworks/systems (all context dependent, of course) would be great, and THEN we could move into personal experience.
- For 4th year, maybe add a panel of executives that we can ask questions.
- I loved my experience at IOM and learned more than I could've hoped. I would ask that next year for breakfast there be an addition of protein. The items provided were all carbs and sugar. I am grateful for all of the work that went into making West a great event!
- Very worthwhile program. as with any institute settings, things aren't always perfect. pretty good venue and presentations.
- I am concerned about the dates of next year's session. Having it back to back with the ACCE Annual Conference worked this year because the two events were across town. Next year we will be forced to leave ACCE early, missing either the last day of sessions or possibly the afternoon/evening before. Additionally, going from the intense hyperactivity of ACCE to the working intensity of IOM was tough. There really needs to be a little down time between the two and I prefer IOM be prior to ACCE.
- Would have liked more protein at breakfast like the quiche the last day. Most people do not eat a ton of pastries/muffins.

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



ATTENDEE SURVEY RESULTS AND FEEDBACK

- Possibly split some classes for Chamber vs Foundations or Associations. I have a couple organizations I'd like to refer to this program. It is very helpful and insightful for Executive Directors that are unaware of legal issues and/or financial issues.
- Exceeded my expectations and I can't wait to return. Hotel was a little shabby but it worked for the situation and the location was good. Conference food was typical but I was hoping for a step above considering the great food available there. Overall, though, FABULOUS EXPERIENCE and thank you to each of you for your hard work to make it so!
- I wasn't fully sure what to expect going into Institute. Most of the teachers had a very laid back approach and allowed a lot of class interaction - which I love most of the time. I was a little disappointed how sidetracked many conversations got though with people telling ""this one time at my chamber"" stories. I felt like valuable time was wasted hearing all those when I could have heard some best practices from the actual instructor.
- Roundtable discussions were more chamber based and should have been an even mix. I would suggest for first years there be a brief overview the first day on the difference and similarities between Associations and Chambers. This would help discussions during the week and build connections. I would love to see a class on generation differences. This was such a huge topic this year and to have a class would be helpful. Faculty that are teaching topics that are not attention grabbers should teach in a different format. For example Finance class...it was losing everyone's attention. Great information but boring delivery. If it could be delivered in another format that would be helpful. The survey should have comment section about food for the week. There should be two buffets and both double sided each day. Breakfast should include protein...boiled eggs, oatmeal, toast/toaster with cups of peanut butter and fruit. We do not need so many sweets in the morning and again at break. Everyone has to be there by 8am and this type of food is easy to grab and filling. Break-fruit, yogurt, granola bars(mix of kind bars and protein bars) if you want to add something sweet that is great but to have all sweets is not needed. People ate it because that is all there was. PM break-was great. If you could work something out with the outlets to be open during the conference that would be a great revenue source for them and make attendees happy.
- Mainly improvement on that class dinner which was quite a mess. I do not wish to pay so much for ok food, inability to pay timely, and sitting all separated so networking is limited.
- The timing with ACCE is a huge problem. This was a very rough week & I would really not like for them to be together again- especially with Institute to follow the convention. A break in between is definitely needed. Would hope that you all could communicate & work that out. I'd like to continue on with the program after graduation in a leadership role & this would deter me for future years if it's not separated again.
- Overall, it was a good experience. I'm looking forward to deeper dives' into the information, year 1 was very surface. I have 20 years corporate management background, and a lot of the information seemed geared for new leaders.
- I answered that I would recommend this site but from what I have heard about others, this is less effective due to the connection to the site and hotel.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Great year! Learned a lot as usual. Probably the best year yet! As you know it was hot in our home room. I was a little disappointed it took so long and a lot of us to complain to get us moved on the second to last day especially since another class got moved. But glad you all were able to move us! I liked having a opening day/evening activity, but \$40 seemed like a lot for bowling and 2 slices of pizza. I know some people in my class didn't even get to eat and paid the \$40. I know you can't do anything about the dates, since they are set but I prefer the Sunday through Thursday schedule. It works better with my work schedule. I know ACCE causes a conflict with the dates. But just thought you should know my preference. Again, great year! Thank you for all you do!
- Many of the CORE classes were at a very basic level. I have more than 25 years of nonprofit experience, have a doctorate in Public Policy with nonprofit management and leadership, and a CAE. It would have been nice to match the course content with the experience of individuals -- maybe an advance course. I know this might take more management of the curriculum but it was really boring sitting through 4 hours when I could probably teach the course. For example, the Legal Core class discussed corporation articles of incorporation and filing for nonprofit status. I just started a new nonprofit, created the articles of incorporation, bylaws, incorporated it and applied for nonprofit status. The same can be said about events and marketing.
- Having to be on campus for 8-10 hours the body needs fuel! Some protein at breakfast or 1st break would be greatly appreciated, fruit, pastries and sugary cereals don't do it for everyone. Last year we had more options with the coffee shop and campus store being open. Also with classes being on the weekend, the trash was out of hand and the bathrooms were borderline just gross. I know this is nothing you guys did but just a suggestion for next year.
- Most professional development opportunities do not meet my expectations. Usually, there are moments of greatness in an overall average offering and IOM was unlike any previous experiences for me. I learned so much! In the courses where I have a fair amount of expertise, I learned critical information that was new to me. In the areas where I'm a novice, the instructors and classmates alike were motivating. I always enjoy networking, but this exceeded expectations. It felt competitive in the most inspirational way. If you cannot tell, I haven't come down from the IOM high. Folks in my office are likely finding it annoying.
- The food at institute was an issue. It seemed that most meals/ snacks provided were very carb heavy. I highly recommend adding some type of protein to the breakfast, whether that be yogurt or eggs or even some nuts.
- I would have liked to see a hot breakfast in the morning instead of the same thing every morning. More Protein perhaps. I did not attend the Big Bash because I had visitors in, but when I heard that it was at the campus, I was not going to spend \$80.00 for a guest. I really enjoyed the Yacht Club last year & really hope to have it there or somewhere similar for the next 2 years to come. Overall, the Institute was great.. I really enjoyed [removed] speaking. He was awesome!! Please bring him back!
- Attending IOM was a very positive experience for me. I learned that we all have the same issues and challenges in our chambers but more importantly, we all have the same opportunities and possibilities for growth and change. The instructors were exceptional and very much knowledgeable about the subjects they taught. I came home invigorated and inspired to make our Chamber even better! I am already looking forward to my 2nd year and looking for a way to get my staff to be able to attend.

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



ATTENDEE SURVEY RESULTS AND FEEDBACK

- I thoroughly enjoyed my time at institute. I learned so much in each class, made some incredible connections, and look forward to attending again next year. I do have a few comments for improvement however: I would love to have more time to network and discuss among ourselves during the day. During our membership class, we received the opportunity to get together and discuss a specific topic with a group of our peers and it was one of the most informative 30 minutes of the entire week. Breakfast was good, however, I know that many people complained that it could use more protein and less sugar. The pastries, while delicious, were not a good way to start the day when you are sitting in a classroom. They made us sluggish and did not help to keep us going throughout the day. Some yogurt, boiled eggs, or protein bars would have been more beneficial. Lunch was good on all three days, however, on the last day, there was fish served and I know we had a classmate who was severely allergic to fish so it did not make sense that it was being served without more precaution being taken. Also, lunch and dinner at the Big Bash, were almost the same on the last day. The coffee place on campus was disappointing as it did not open until 8 am on Thursday and Friday and it was closed all day on Saturday and Sunday. I do not know if they would be willing to open earlier, but I know they would get quite a bit of business if they did. Lastly, the room that we were in, room 3999 was a gorgeous setting with the window walls looking out over the campus, however on Saturday and Sunday it was pretty warm which made it hard to concentrate. Overall, the experience was amazing! These are just a few minor details that I noticed during my time at Institute.
- Many speakers are older and a bit out of touch from the cutting edge. For example, a major movement in non profit world is "Generative Governance" -a term which none of my speakers knew! Most helpful is the boring stuff-legal accounting, etc. [Removed] closing was very strong.
- I was disappointed in the speakers. I really only had maybe two speakers that were outstanding. The others were either speaking below all of us in the class or were just poor speakers. The speakers in Tucson were much stronger.
- Even though I was able to download the presentations from the app it would be nice to have access to them and be able to download to my computer. Overall Institute is a great experience.



NORTHEAST

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

2019 BOARD OF REGENTS

CHAIR

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Institute for Organization Management

2019 BOARD OF REGENTS

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Term: 2016-2020



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

AGENDA

OCTOBER 4, 2019

10:15 A.M. – 12:00 P.M. EDT

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

- | | | |
|------|--|-----------------------------------|
| I. | Welcome and Introductions | Peter J. McNamara, IOM, CAE, J.D. |
| II. | Approval of Minutes | Peter J. McNamara, IOM, CAE, J.D. |
| III. | Institute Staff Update | Institute Staff |
| | A. Program Updates and Looking Ahead | |
| IV. | Nominating Committee Report | Douglas O'Flaherty, IOM |
| V. | Analysis of 2019 Northeast Institute | Board Members/Institute Staff |
| | A. Final Enrollment Report | |
| | B. Survey Results and Discussion of Institute Week | |
| VI. | 2020 Northeast Institute | Douglas O'Flaherty, IOM |
| | A. Create 2-3 Strategic Goals | |
| | B. Discussion of Week/Assign Regent Responsibilities | |
| VII. | Other Business/Adjournment | Peter J. McNamara, IOM, CAE, J.D. |

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



MINUTES

JULY 28, 2019

11:30 A.M. EDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

In attendance: Peter J. McNamara, IOM, CAE, J.D.; Douglas O'Flaherty, IOM; Steve Clark, IOM, CFE, J.D.; Kate Conroy, IOM; Amy Hager, IOM, CAE; Cheryl Kuhn, IOM; Dan Lemyre, IOM, CAE; Patty Montgomery, IOM, CAE; Mike Smith, IOM, CAE, CPA; Robert Uhler, IOM, CAE; Heath Barrett, IOM; Gene Jannotti, IOM, MBA; Roy McGrath, IOM, CAE; Martha Rahlston, IOM; Carol Vargas, IOM, CAE; Raymond P. Towle, IOM, CAE; Katelynne G. Cox, IOM; Mandy Pan; Megan Kastner

I. Welcome and Introductions

Peter J. McNamara, IOM, CAE, J.D. welcomed everyone to the meeting and introductions were made.

II. Staff Updates and Week Overview

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

III. Photos and Joint Lunch

A group photo was taken and participants caught up over lunch.

IV. Class Advisor Responsibilities

Specific Class Advisor responsibilities were discussed in detail. The first Class Advisor Broadcast was reviewed with the group and questions were answered. The role of the Regent Partner was also reviewed.

V. Other Business and Class Advisor Adjournment

Additional Class Advisor business was discussed prior to advisors being dismissed.

VI. Board of Regents Business

- Approval of minutes
 - The minutes from the May 21, 2019 conference call were approved with no changes.
- On-site regent responsibilities
 - Regent roles and expectations during the Institute week were explained. This included, but was not limited to: information on when to arrive at Bartley Hall every day; how they should network with attendees during meals and social functions; after-hours interaction with attendees; what to do while attendees are in class, etc.



MINUTES

JULY 28, 2019

11:30 A.M. EDT

BOARD OF REGENTS AND CLASS ADVISOR BRIEFING

- Visiting Homeroom
 - Regents discussed the possibility of visiting each Homeroom.
- Importance of fundraising
 - The group was reminded of the various ways to fundraise and that all funds raised on-site go to Institute scholarships.
- Additional business and adjournment
 - Any remaining business was discussed prior to adjourning the meeting.

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



NORTHEAST

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

2020 SCHEDULE OF ACTIVITIES

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

Sunday, July 26

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

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

Monday, July 27

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

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

Tuesday, July 28

8:00 a.m.–10:00 a.m.
10:30 a.m.–12:30 p.m.
11:00 a.m.–11:30 a.m.
12:30 p.m.–1:30 p.m.
1:30 p.m.–5:00 p.m.
2:00 p.m.–2:30 p.m.
Evening
7:00 p.m.

Elective Classes: Bartley Hall, Individual Classrooms (*Break: 10:00–10:30 a.m.*)
Elective Classes: Bartley Hall, Individual Classrooms
Board of Regents Meeting: Faculty/Regent Office, Bartley Hall
Lunch: Dougherty Hall
Core Classes: Bartley Hall, Individual Classrooms (*Break: 3:00–3:30 p.m.*)
Class Advisor Meeting: Faculty/Regent Office, Bartley Hall
Class Dinners
Volunteer and Faculty Dinner: Dougherty Hall, West Lounge

Wednesday, July 29

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

Core Classes: Bartley Hall, Individual Classrooms (*Break: 9:30–10:00 a.m.*)
Class Advisor Meeting: Faculty/Regent Office, Bartley Hall
Lunch: Dougherty Hall
Core Classes: Bartley Hall, Individual Classrooms (*Break: 2:00–2:30 p.m.*)
Graduation Ceremony and Big Bash: TBD

Thursday, July 30

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

Core Classes: Bartley Hall, Individual Classrooms (*Break: 9:30–10:00 a.m.*)
Class Advisor Meeting: Faculty/Regent Office, Bartley Hall
Board of Regents Meeting: Faculty/Regent Office, Bartley Hall
2020 Northeast Institute Concludes



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

2020 BOARD OF REGENTS RESPONSIBILITIES CHECKLIST

Class Advisors

Mike Smith

Silent Auction/Fundraising

1. _____

2. _____

3. _____

4. _____

Industry Consultations

1. _____

2. _____

Scholarships

1. _____

2. _____

3. _____

Opening Welcome

1. _____

2. _____

3. _____

Graduation Ceremony and Big Bash

1. _____

2. _____

3. _____

State Photos

1. _____

2. _____

Volunteer/Faculty/Staff Dinner

1. _____

Social Media Strategy (Optional)

1. _____

2. _____

Ambassador Program (Optional)

1. _____

2. _____

3. _____



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

GEOGRAPHIC BREAKDOWN

2019 Northeast Institute

130 Attendees from 30 states and the District of Columbia

State, Number of Attendees, %

Alabama	1,	0.77%	Nebraska,	1,	0.77%
Arkansas,	1,	0.77%	New Hampshire,	3,	2.31%
California	1,	0.77%	New Jersey,	4,	3.08%
Delaware	1,	0.77%	New York,	4,	3.08%
District of Columbia,	12,	9.23%	North Carolina,	5,	3.85%
Florida,	2,	1.54%	Ohio,	1,	0.77%
Illinois,	5,	3.85%	Oklahoma,	5,	3.85%
Iowa,	1,	0.77%	Oregon,	1,	0.77%
Kansas	1,	0.77%	Pennsylvania,	10,	7.69%
Maine,	1,	0.77%	Rhode Island,	1,	0.77%
Maryland,	11,	8.46%	South Carolina,	4,	3.08%
Massachusetts,	4,	3.08%	Texas,	9,	6.92%
Michigan,	5,	3.85%	Utah	1,	0.77%
Mississippi,	2,	1.54%	Vermont,	2,	1.54%
Missouri,	4,	3.08%	Virginia,	24,	18.46%
			Wisconsin,	3,	2.31%

Top Increase since 2018

North Carolina +3

Most attendees in 2018, Virginia with 38

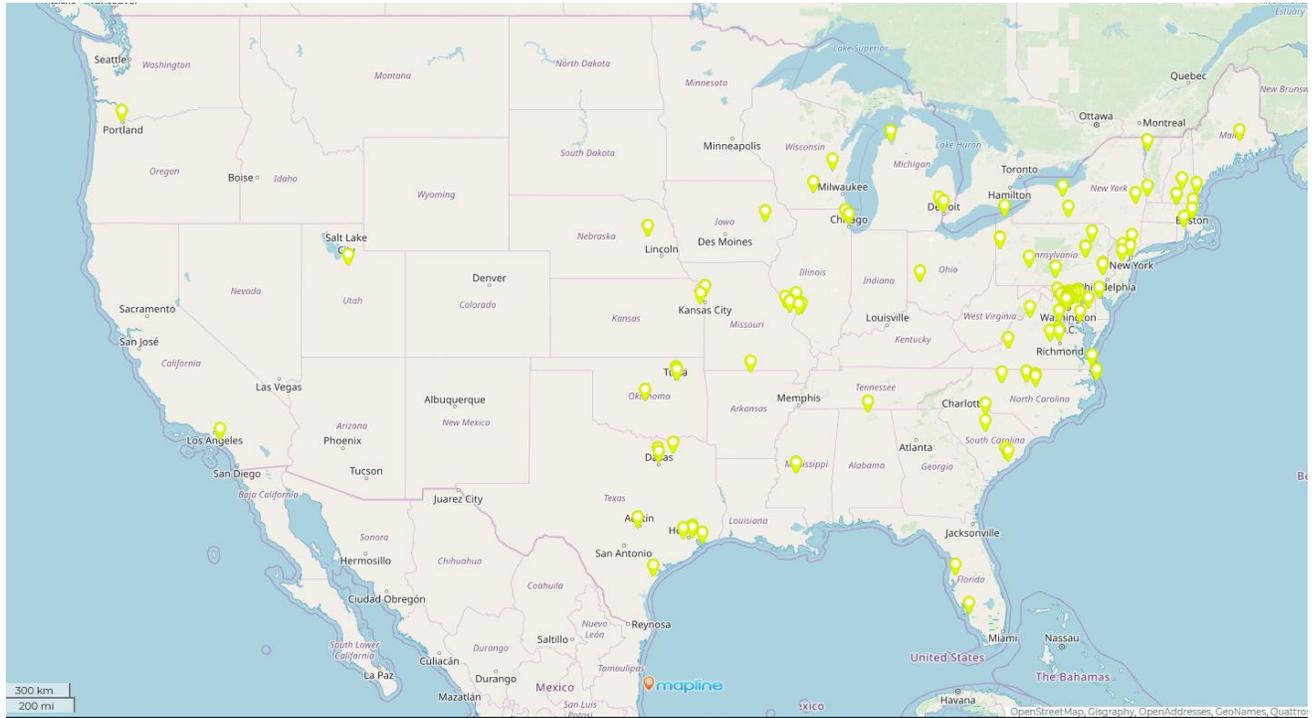
Most attendees in 2019, Virginia with 24



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

GEOGRAPHIC BREAKDOWN

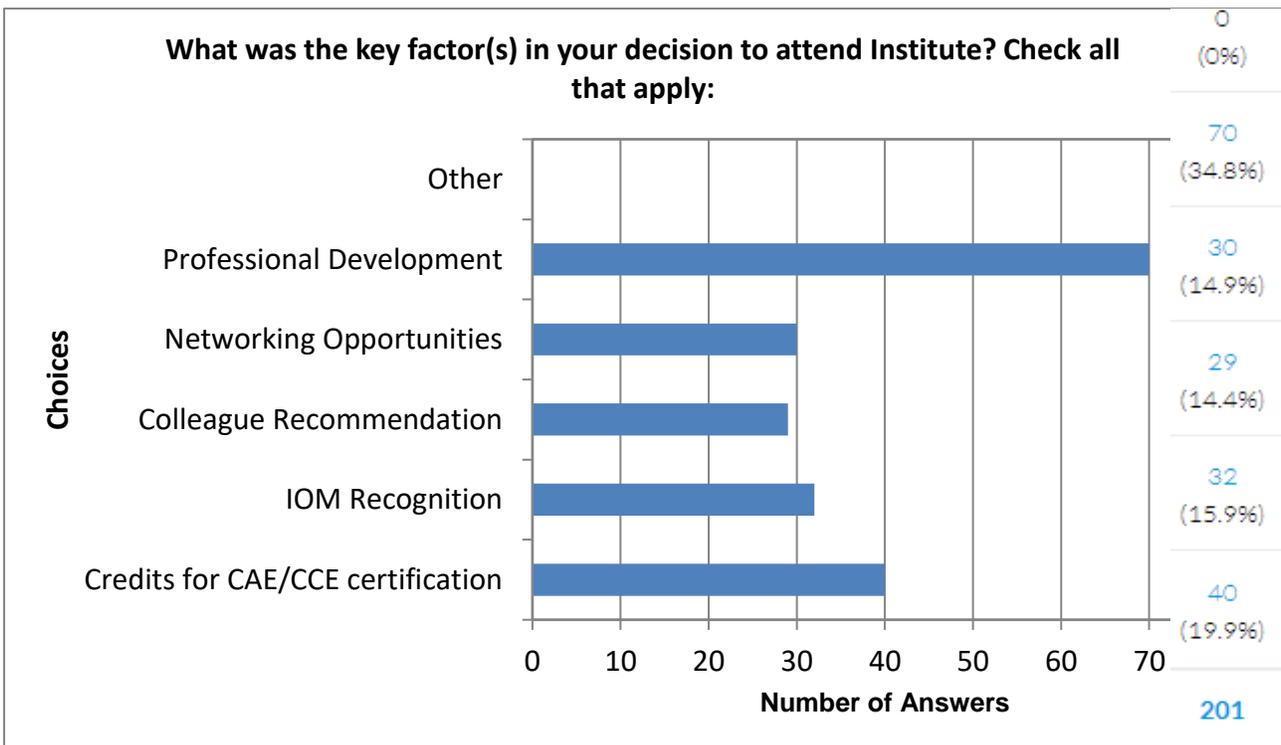
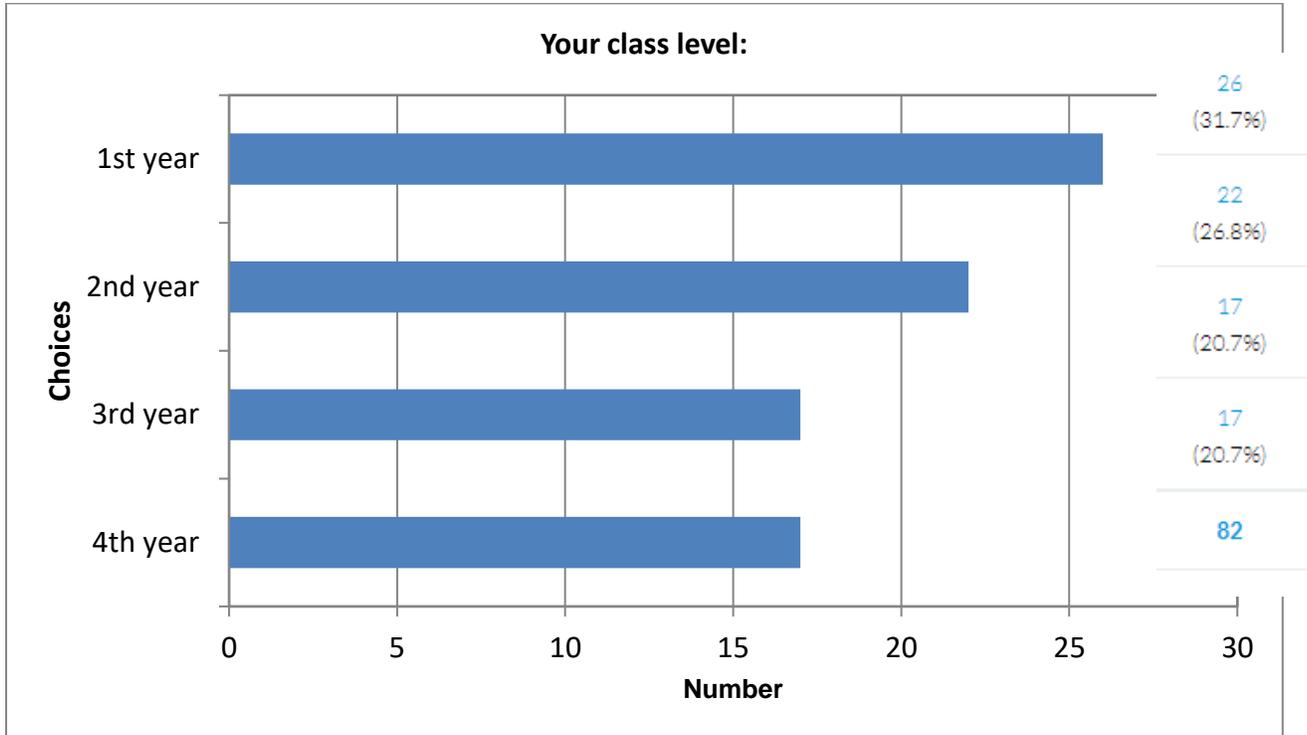




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Institute for Organization Management

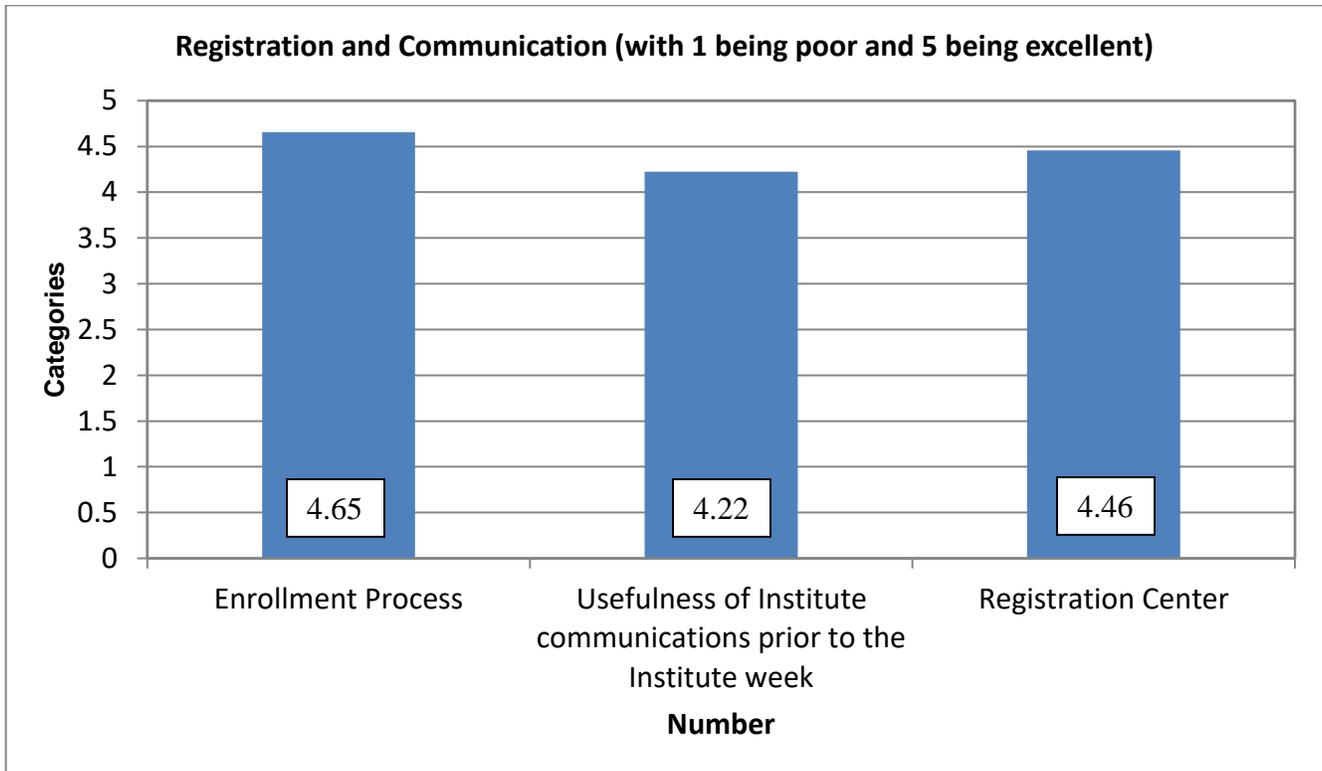
ATTENDEE SURVEY RESULTS AND FEEDBACK



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



ATTENDEE SURVEY RESULTS AND FEEDBACK



Q4: Additional comments about registration and communication*:

- I have always found CVENT somewhat of a clunky program to register for events or to do RFP's on when I was in the hotel business. As a first year, it was confusing at first. But the U.S. Chamber Staff, Institute Staff, & our class advisor, [removed] more than made up for it. Thank you.
- We had some issues with the way the graduation speaker selection was handled.
- Over the last 3 years, we would have a lot of communication and materials available ahead of time. This year, everything was done through the app, which only came out a week ahead of the classes and did not work very well.
- I contacted [removed] to change an elective and she was very responsive and helpful. Process was seamless.
- The registration center for the Saturday check-in was located in a non-marked building next to the stadium on campus that was difficult to access and find. I called and the young girl working who answered the phone did not have good customer service skills and wasn't helpful in finding the building.
- Registration for Institute was very easy and straightforward. The follow-up emails and communications leading up to the first day were well-timed and beneficial. The onsite registration area was easy to find the next day and very well organized, and the staff was very friendly.

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- There is very little advance communication. In speaking with a number of first year attendees, they were frustrated with the lack of communication on what to expect, needing a car to get around, the lack of access to basic necessities in the dorms, and the lack of information on the bus. I recall having the same concerns in my first year and providing that feedback then.
- We could have used more information about lodging. We booked the dorms but could have afforded the Radnor. We did not enjoy the dorm experience and a primary factor of staying on campus was the expectation that everything was walkable. Once we realized we'd be needing to drive or take the bus daily to class that also made the dorm rationale the wrong decision.
- I thought I had to go to the registration center on campus and it took me a while to find it, turns out I did not need to report there so it was a waste of time.
- It would have been nice to receive the mobile app several weeks in advance of the training.
- Not enough information was given beforehand about the logistical issues with this conference. The enormous amount of walking in the heat. A 20 minute walk to lunch and back. More transportation should be provided.
- It was nice to have all of my information in once central location.
- Institute is so high-impact, I'm wondering if a campaign - maybe an email a week for the four weeks leading up to it - with one or two key questions to ponder while we work. To get us thinking about bringing situations and ideas with us.
- It feels like I receive far too many e-mails in the 1-2 weeks leading up to IOM. Would be nice if this information was consolidated into fewer e-mails.
- I feel more information about how bare bones the dorms are would have been helpful. Also let folks know if you don't have a rental you will be uber/lyfting everywhere as there is no place close by off campus within walking distance to shop/eat/entertain...etc.
- People were confused on where to go and pick up their badge and if they stayed at the dorms- the staff didn't ask where we were staying and I had to figure out with dorm to go to get some things.
- The best information came from the Advisor.
- It would have been beneficial to me to know that my accommodations were on the west side of the campus while all my classes and being able to eat at Donahue hall were on the south side of a 260 acre campus. I would have rented a car when I arrived at the airport. I understand the cost for institute no problem with that; however, trying to be frugal with Chamber monies and selecting the apartment @ \$99/night with not having a comfortable bed, distance, and lack of amenities I would have gladly paid the additional monies to stay at the hotel had I fully been aware of the situation.
- Excellent communication and I especially appreciated the communication from our Class Advisor, [removed]!
- There needs to be more communication about the parking offered on campus. It was unclear that if you were staying at the hotel, you would still have the opportunity to park in the garage. It made sense upon arrival, but it would have been nice to know prior to the week starting.
- For those staying in the dorms it wasn't problematic to get the meal cards at the dorms, but that caused a great deal of confusion for those staying off campus.

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ATTENDEE SURVEY RESULTS AND FEEDBACK



Q6: Additional comments about customer service*:

- Staff at the Radnor was not well educated on shuttle questions. All attendees received a welcome letter from the Director of Corporate Services and in the letter, it stated there would be a shuttle schedule at the front desk. None on the front desk attendants knew anything about it. I told them once they had the info to please call me and I never received a phone call with the info. Thankfully I discovered the schedule was listed in the app.
- The Board of Regents President & Vice President did an outstanding job being energetic & enthusiastic about our journey!
- [Removed] was terrific! The advisors and regents can have a "cheesy" role - the matching shirts, the roll call, the over the top team stuff at times. I like a lot of it but they may want to consider toning it down a bit - especially the groovy attire. It's a barrier to interest for me - I'd be down with having something like nametags or a certain color/own attire identify us, but not matching polo shirts and shorts. Seriously. With that said, they're all really helpful and I am grateful for all they do for IOM. Some really wonderful people!
- Seemed like there was new staff this year and it was very disorganized - a lot of information that our class advisor would give us, ended up being wrong or changed at some point. Very little process or communication on events, bus times, how to use the app, state and class pictures, etc.
- Everyone I met at Institute was very friendly and helpful and seemed genuinely interested in helping and creating a positive worthwhile experience. The staff at the Radnor was very helpful as

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ATTENDEE SURVEY RESULTS AND FEEDBACK

well. My only not so great experience came from the restaurant. The staff seemed overwhelmed by our table of only 8 guests (at a time when there was no crowd.) The manager was grumpy and somewhat rude and only took the time to help our server (who was delightful even though it was only his 3rd day on the job) when we asked to split our tabs. For some reason seemed to cause a big problem for him.

- I had a great overall experience except for the Villanova staff girl working the Saturday registration at the building next to the stadium.
- I am a professional with 20+ years experience. I would prefer if Institute staff not speak to me and treat me like I am still in elementary school. I appreciate there are deadlines and requirements, but just ask me in a professional way, and I will respond in turn.
- I think everyone involved does a great job with their customer service skills. It's not pretentious and everybody is very helpful and enthusiastic.
- Our class advisor [removed] went above and beyond to help us and make arrangements for us. She truly cared about our institute experience. I would highly recommend her to come back as an advisor.
- The staff pushed the App a lot but did not do enough to train the participants so it was hard to find information.
- A little less self-serving and a little more customer service focused would be welcomed.
- Customer service was top notch from all. I would like to especially commend [removed] for doing a terrific job as our class advisor. He was enthusiastic, personable and willing to help. Great job [removed]!!
- Terrible experience with Radnor staff, but I've followed up with them regarding this.
- the Board of regents were amazing. I especially thought it very nice that they offered their services to assist us during their breaks.
- Excellent customer service was displayed at all times.
- I really like the idea of class advisors (and aspire to become one). I have witnessed, however, that there is great variability among said advisors. Some seem shy and/or cautious. Likely unsure how or when to Advise. To call them an advisor, I think the framework/rules of engagement need to be clearer to both students and advisors. As far as feeling 'well taken care of' - no question. TOP NOTCH. It's clear that the folks who volunteer to run this thing do it because they believe in it!
- This is my third year, and I've yet to have the same advisor twice. There should be more time/instruction given to Class Advisors so they can serve as a networking hub for the rest of the class. It just seems like they're "dropped in" to a vacancy, as opposed to serving as a class advisor for a core group all 4 years.
- Institute staff we quietly working in the background, doing a great job. It might be nice to give them more visibility. This was lost when Institute decided to give up the welcome event. The gathering in the auditorium helped. Hotel staff were great representing their hotel, but didn't seem to add much to the Institute experience.
- Board of Regents auditing classes should allow the class to be the main participant in discussions and Q&A and not dominate conversations.
- I would recommend that the class advisor be responsible for planning the class dinner. We fortunately had someone step up, but it was a lot of unnecessary communication back and forth,

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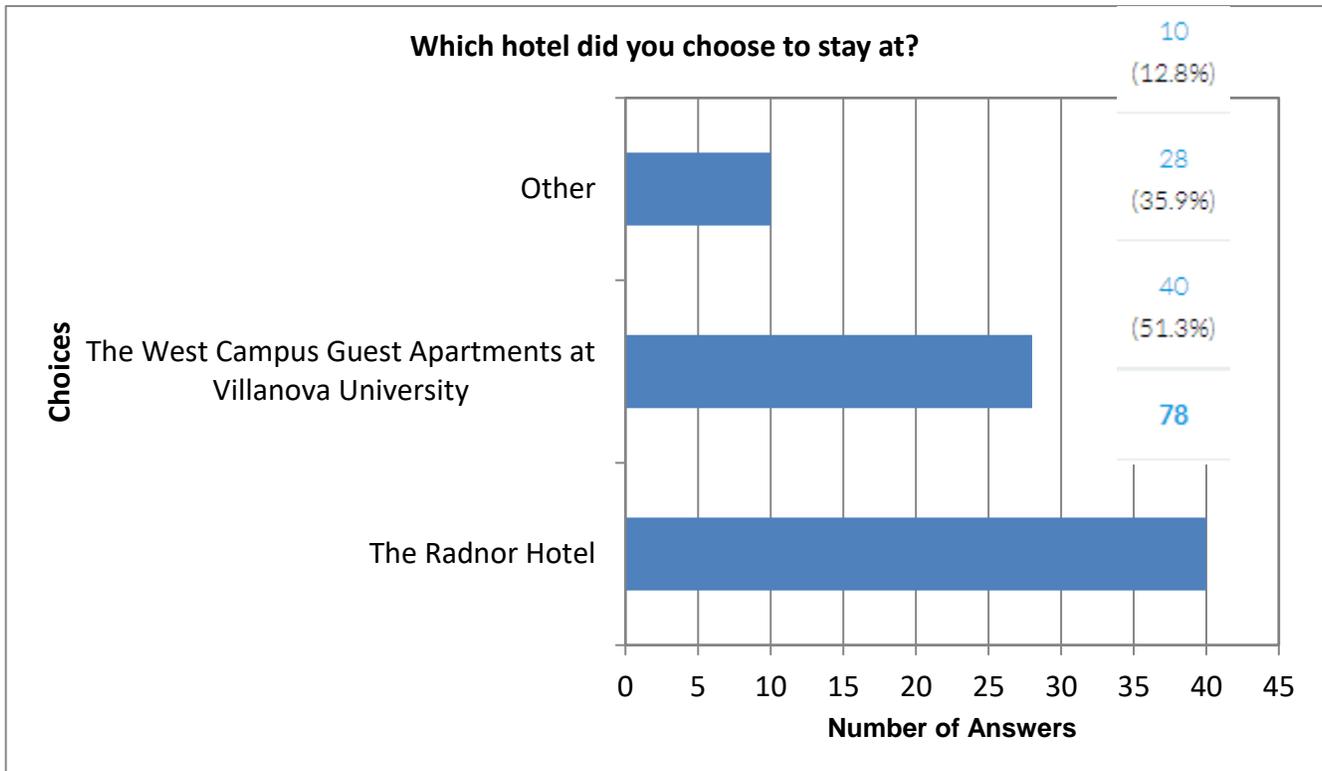
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ATTENDEE SURVEY RESULTS AND FEEDBACK

when it would have been easier to be told this is where we're going and when, bring \$XX to homeroom if you're coming.

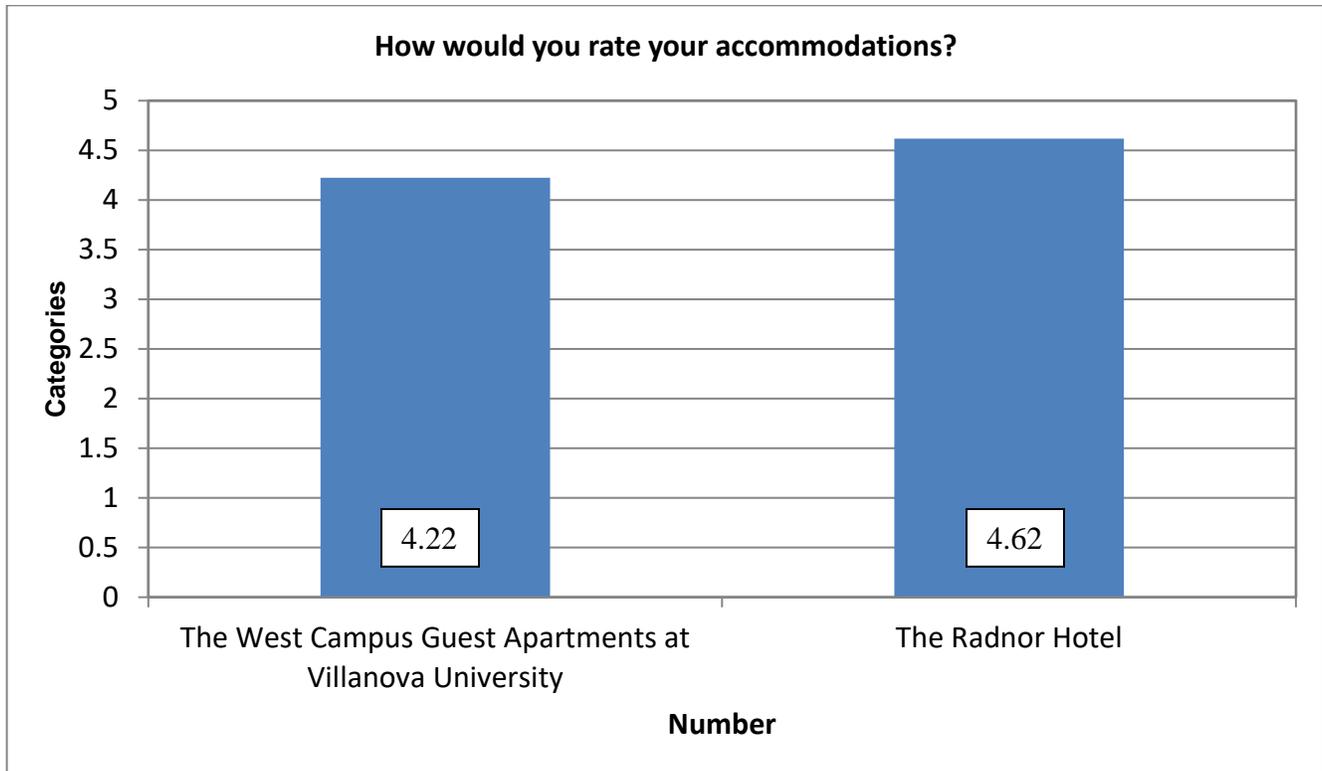
- [Removed] was fabulous. Friendly, helpful, calm. Made our class a wonderful experience.



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ATTENDEE SURVEY RESULTS AND FEEDBACK



Q9: Additional comments about accommodations*:

- Even more spare in accommodations than I expected. Fixtures were very old and unpredictable. Toilet malfunctioned off and on the whole week. Very poorly located for IOM activities.
- Room was very nice and clean.
- I've had a good experience with The Radnor both years. I heard talks about potentially changing hotels, but I'd vote to say at the Radnor. It's close to campus and has a restaurant for those of us who don't have cars at IOM.
- The Guest apartments didn't have a coffee pot and the linens are a little rough.
- It was refreshing to get out of my work environment & stay on Campus where I could slow down & focus. For me, it was a pleasure to be in a quiet atmosphere without a lot of nightlife activity so I could learn & recharge at the same time.
- I do wish the cafeteria was closer to the dorms. Having a hour seems like enough time to eat but when you need to walk or find parking, it can take up a lot of that time.
- It would have been nice to know that the mattress was only 4-6 inches thick, and that the pillow and bed were covered vinyl. I would say this was the worst part of the dorms.
- Some of the floors had refrigerators and others did not. This is my second time on the third floor and it has definitely not been remodeled. The ice maker is still broken. The halls smell musty. That said, people were nice and it's convenient to the classes and has walkable dinner options.

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- Room was clean. Would recommend leaving out one or two extra towels and providing facial tissues.
- Probably the best year I've had at the Radnor.
- It's a dorm, so I knew what to expect, plus I stayed there in year 1. I would recommend Institute work to have participants stay in the new dorms being opened this fall. They are closer to our classrooms and cafeteria. I love staying on camps and being close to the activities, but would certainly appreciate newer rooms. The current dorms are pretty old and come across as old. The newer accommodations would be great!
- I liked the dorms, very quiet. The walk was a little long.
- I had a room that had been recently remodeled so it wasn't bad but the hotel itself is aging and need of some attention.
- The room service at the Radnor was not desirable. However that is not Institute's issue...with the close proximity to the little downtown area...there were no food issues. I really like the location of the Radnor and the hotel staff were very friendly.
- We had originally registered and stayed one night at the West Campus Guest Apartments. They were horrible. I would never recommend them to anyone. Though they are cheaper and some organizations want to save money. These apartments and the beds were disgusting. Had I know I would never have set foot in there. It really would have been nice if someone contacted me ahead of time to discuss the housing options as a first year I didn't know what the best option would be.
- See notes in communication section.
- Plain language is important. I was disillusioned last year on Night One on campus. But by night three I was committed to staying on campus all 4 years. I think we need to be clear about campus facilities being quiet, spartan and convenient. The ease of walking place to place; the SILENCE; the full kitchen... I find staying on campus to be more relaxing than staying in a busy Marriott!
- Might have preferred a better description of the dorms. I may have considered staying there. Perhaps next year.
- The Radnor provided very comfortable accommodations. The daily housekeeping was adequate, and the staff was friendly and helpful. I don't know what hotels are in the area, but the location does not provide many options for dining or shopping for incidentals that may be needed for what could be a 5-day stay for some attendees.
- I don't mind the Radnor, but I'd love it if more options (with bussing) were available.
- One of our showers was out of order, so we had to share. It wasn't a big deal to us, but it might've been to some people, so I would suggest checking all the bathrooms and facilities in each room before assigning them to guests.
- Rooms were MUCH cleaner this year... but OMG it was an ICEBOX at night, even when shutting everything off. They should offer more than 1 blanket and have extra pillow cases in case you use more than 1 pillow.
- I chose not to stay at the Radnor this year, since I did last year--- and the hotel was in dire need of renovations. I'd rather earn points with a major chain and newer establishments.
- The year I tried the dorms (year 2), my room was so cold I had to use the oven to heat it up. The air conditioning/humidity/combo made the sheets, bedding and towels damp to the touch. I

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ATTENDEE SURVEY RESULTS AND FEEDBACK

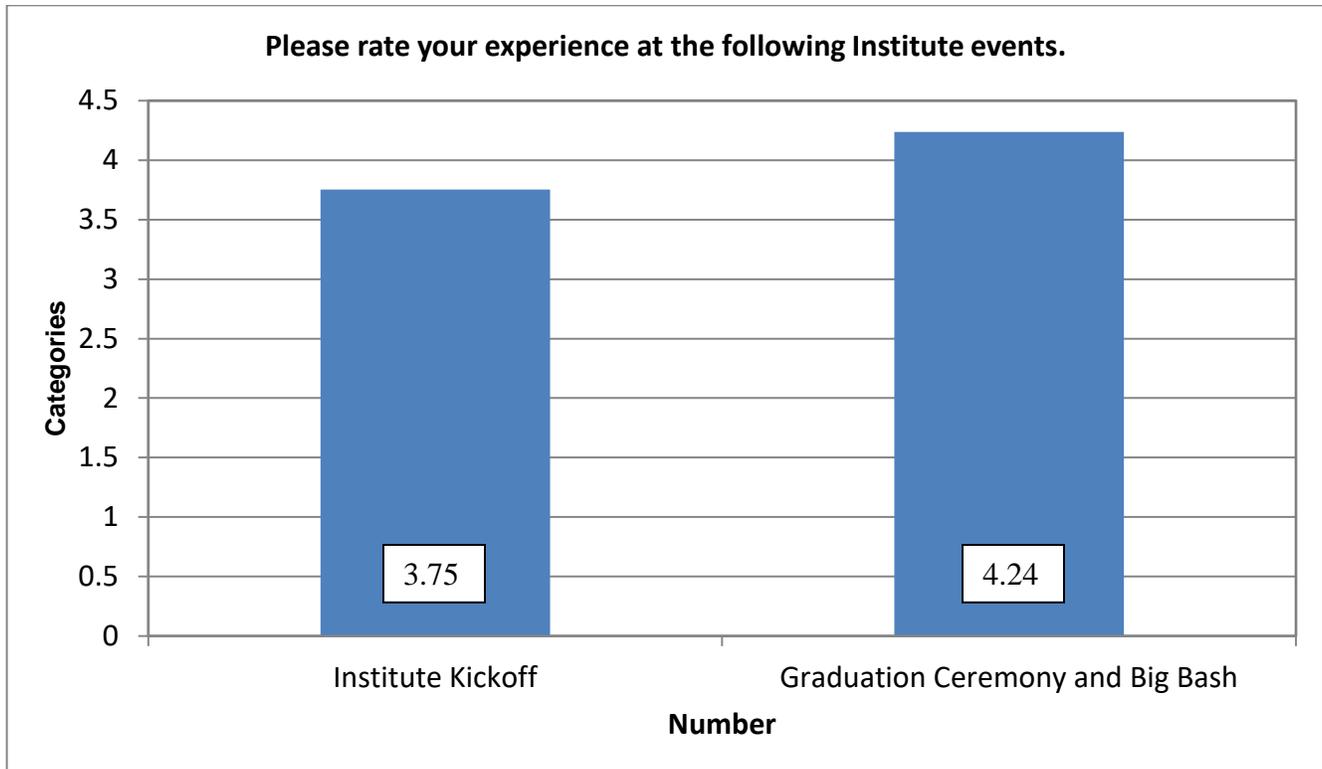
know others did not have the same experience, and I probably should have requested another room. But it would be a good idea to check in on dorm dwellers and make sure everything is ok.

- The distance between the hotel and the program is disappointing. the division of attendees among many distant hotel/dorm locations does not allow for much camaraderie among classmates.
- In the future I will select the hotel.
- IOM should look into letting people stay in the new dorms on Lancaster next year since they will be extremely close to where we have class. Therefore negating the need for a shuttle.
- The Radnor was so so - a pretty basic hotel. Overall, having Institute at Villanova where nothing is within walking distance (including the dining this year!) is not great. Hearing from attendees who were at other sites like Athens and Madison, it sounds like those locations are in the downtown area so both amenities and things to do are within walking distance. Northeast should be relocated to a better location.
- We brought sheets and towels but were bothered that the room was so sparse. No coffeemaker or television which is standard in a hotel room. No table lights so it was fluorescent overhead light or nothing. Very isolating as well. Once in your room you could not gather with others or know what was happening onsite.
- My room and the staff at the Radnor were great! My only complaint - weak coffee. But I discovered the STARBUCKS across the street!
- There needs to be more communication with the hotel staff about the bussing. Initially, we were told it was a Radnor Hotel shuttle that would be taking us back and forth to the campus; however, it turned out to be a large coach bus instead; the hotel staff was not helpful in this regard. There was also a rumor floating around about moving to the Double Tree next year. I would highly recommend that if this is the case, there needs to be more time allotted for bus travel back and forth to the campus.

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ATTENDEE SURVEY RESULTS AND FEEDBACK



Q11: Additional comments about events*:

- There wasn't much at all to the 'kickoff.' We'd already heard everything we needed in homeroom. So 'kickoff' just wound up being introducing us to more people and cheerleading. Why not make it useful by including some dramatic content to whet our whistle. A 30 minute session from one of the best teachers -- or even an inspirational bit from [name removed]. Or if it is just introductions, have it in a place where you can have appetizers and drinks to welcome people to IOM. As it was, that was a very lackluster session at a time you want to be building people's excitement. Many of the first years around me had a similar response in real-time, whether they comment on it or not. (And I'm a bit reluctant to comment on it, since I think the week was very positive and I left with a very good impression overall.)
- Institute kickoff was a bust - bring back the opening reception. The graduated ceremony was great, but the location was a big bummer. The Inn at Villanova is perfect and I was disappointed not to graduate there. The bus got to us late and the big bash seemed shorter than usual.
- I went to Tucson in January - their kickoff was obnoxious and long. Well done Villanova. Tasteful and concise. Big Bash seemed shorter. Feel like the music was cut off earlier than in the past. Also signage at the hotel was terrible. I didn't take the shuttle and had a challenging time trying to locate the ballroom. Hotel staff were unhelpful.
- I didn't attend either event.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Institute Kickoff - I like that this is coming to Villanova. I'm sure it will take some time, but I'd like to see it amp up and get everyone more excited. Encourage students to bring fun to the event (horns, pom-poms, noise makers, etc) It's missing that exciting vibe...it will get there!
- The Institute Kickoff used to be a far more immersive an experience on Sunday night to get people talking and excited for the week ahead. Now the kickoff is little more than a logistical information gathering session. Perhaps an official kickoff can be reinstalled.
- The room for kickoff was weird and did not help get the energy up. The hotel was better for the bash than the inn previously.
- Kickoff -felt like a missed opportunity for people to get together. I don't know if this fell the way of all the other logistics issues but not having a sit-down with everyone right off the bat didn't bring everyone together like other years. If you stick with this format you may want to incorporate more participant activity, and have a light reception in the lobby after vs. full sit down dinner. Just a thought. Graduation itself was wonderful, of course - it was my class! But I have to mention the bus not arriving on time, and then us being forcefully directed onto the stage for photos immediately upon arrival as if it was our fault the bus didn't come. Logistics played such a role in overall experience this year, sadly! Still, we were thrilled to be together. I know the staff were doing the best that they could. The Big Bash was great fun! Too short! We could have danced all night ha ha. Loved seeing everyone having a great time. Bittersweet celebration.
- I thought the kickoff was a nice touch this year. The 8:30 bus at graduation was late this year, but not a big deal.
- I was really disappointed there was no real kickoff event this year. In years past there was a good opportunity to see each other (over food) and reconnect. Games and other interactions to help new people warm up and get to know the class. This year, it seemed like a bunch of extra walking to just sit and learn the names of the regents and advisors.
- There was no kick-off - not sure why we had to be there on Sunday night, without a reception, dinner or event. If I was a first year, it would have been very difficult to really meet my colleagues, advisors, and instructors without an opening event. The graduation seemed rushed, with pictures beforehand instead of on stage and no flowers this year - why not just mail us our certificates. Also, the venue was not as nice.
- The kickoff could have two components - a mini reception with snacks, water and soft drinks that would allow day one networking and connecting followed by the theatre style pep rally. Perhaps the reception portion could involve a mini-icebreaker that would allow attendees to find others they have in common with including their IOM year (state of origin, college, role within their organization, number of years in the industry, etc.).
- The kickoff was nice but I would have preferred to know that it was optional including homeroom on Sunday night. I would have maximized my time at home with my family on Sunday before rushing to get to campus on time.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- This is a business event primarily - why not have a business leader speak at the kickoff and make it a good use of time? I don't understand why people are required to come in on Sunday for 45 minutes of homeroom which could be done the next day and a half an hour of listening to volunteers talk. It would have been great to have someone like the CEO of the Philadelphia Chamber welcome us and then have a coordinated activity like a tour of Philadelphia offered. I would be willing to have the tuition increase \$50 for something of value.
- I liked having the kick off event in the auditorium. I think that type of pep rally is necessary. Venue was much nicer than other years. Food was okay.
- I think that the kickoff should be more of a short reception....most have traveled all day and a quick treat or refreshment would have been nice. Although upon check-in those were available, but it would have been nice for this event as well. Perhaps even goody bags that would be kind of like a "kit for the long days of learning." I appreciated the water bottles and stations.
- I am not sure what happened with the buses that night but it was a mess. The app specifically stated the times and that did not happen and the buses back from the big bash do not stop at both locations as indicated on the app, luckily a classmate offer to give us a ride back.
- Big Bash was very nice - band was great, food was great.
- I think that we should go back to the big kickoff we had before with dinner and drinks. It seemed short and unneeded this year and I think the old kick-off was really good for the experience, especially for 1st-year attendees. The bash felt shorter than in years past. I didn't mind the DoubleTree though.
- Kickoff would be improved with homeroom teambuilding activities. Graduation would be improved if time limit of graduating class speech.
- You need to establish an opening night celebration. Stop with this unofficial crap.
- I definitely like the double tree better than Villanova Inn. It felt more celebratory. Maybe because it was more open? The Villanova Inn was really small.
- Both events were good. The new venue for the Big Bash was roomy and the service was high level.
- Frankly, I don't remember kickoff, but I am sure it was nice.
- Both events were in new locations and lacked signage or properly located staff to direct attendees to the correct spot.
- The Institute Kickoff was sparsely attended by upper class men. Perhaps the vibe of IOM would be that much higher if more upper class men attended. Just a thought.
- The kickoff was okay but I think it could gain impact if there was a wrap-up on Thursday and we could tie the two together somehow. I know time is short, but there's a way. Even if it included breakfast on Thursday. I suspect that graduation is hard to coordinate. Large group. Dry program (unless you're graduating...), but there must be some opportunity here too. (Not for nothin' the food seemed worse than it likely was because we'd eaten like kings and queens the two nights preceding! I'm wondering if a charismatic keynote might help (one that likes to dance). And maybe they could talk about special events management and use the evening as Exhibit A. Just noodlin'.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- I didn't not attend the kickoff because the fact that we would have to pay for food and drinks. The Graduation Ceremony was really nice as always... BUT food was bad, had no taste and it was the exact meal from the last 2 years. The music- it was the same band, playing the exact same playlist as my 1st and 2nd year... why would they do that? Lastly I think having an open bar the first hour would have been better then change it to a cash only. I left early because I just could not take the bad playlist or the food.
- Bring back the Sunday night reception. You are missing a great opportunity for 1st years to connect with others before classes start.
- Keep working to make the kick-off more of a celebration of new and returning students. I enjoyed the Happy Hour this year, but not many attended. The Big Bash was fun. Loved the band as always. The good was good too. Sure missed having the same venue as years 1-2-3, but understand that change is part of life. Seems our 4 years included lots of change and transition to a different model.
- Institute Kickoff -- this year it seemed like it was put together last minute. The theater space made networking extremely difficult, and without any refreshments. Plus it wasn't in the same building, so you probably lost some attendees on the walk across campus. And to not have a hosted social event with drinks and nosh in the same space--- I imagine the turnout for the Happy Hour at 333 Belrose wasn't as large as you might have thought it would be.
- The kickoff was a waste of time. I liked the idea of the kickoff reception at the bar but it is tacky to have people pay for drinks. Increase the cost to attend and increase the experience.
- It would have been nice to know that some of the activities were off campus so I could have rented a car and not had to find a ride.
- The kickoff was great the BASH was just OK. I am not a big dancer (with people I barely know) and I was seriously wiped out by that night. The venue was nothing special and too long a bus ride to get there. I was ready to leave by 8 pm.
- The location this year was not as ideal as previous years. While the silent auction was online this year, it may have been helpful to have the items, or some of the higher ticket items, displayed to help remind people to bid.

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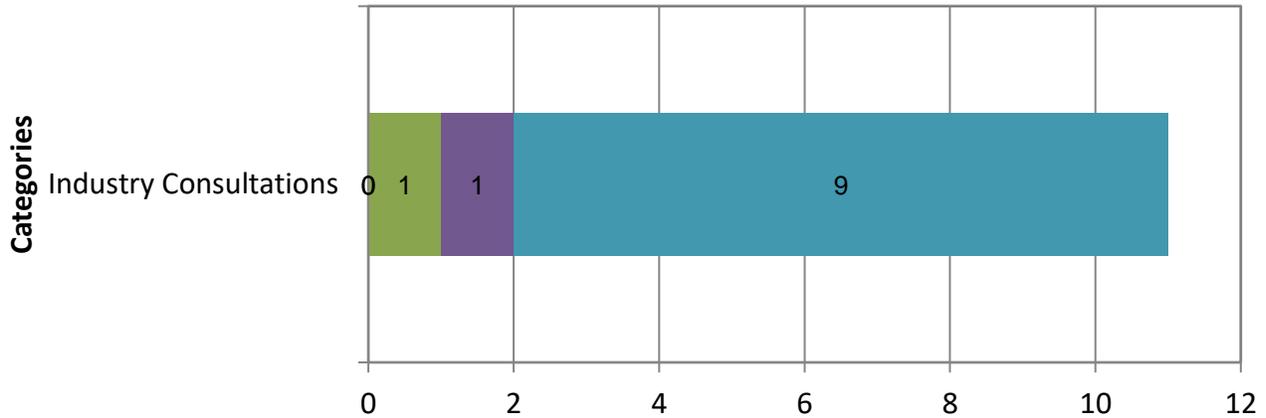


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ATTENDEE SURVEY RESULTS AND FEEDBACK

Please rate your experience participating in industry consultations.



Industry Consultations	
1	0
2	0
3	1
4	1
5	9

Number



Answer Category	Choices						Totals
	1	2	3	4	5	N/A	
Industry Consultations	0 (0%)	0 (0%)	1 (1.3%)	1 (1.3%)	9 (11.3%)	69 (86.3%)	80
Totals	0	0	1	1	9	69	80

Q13: Additional comments about industry consultations*:

- Nice to know they were there.
- We met in a busy public area, more confidential setting would work better.

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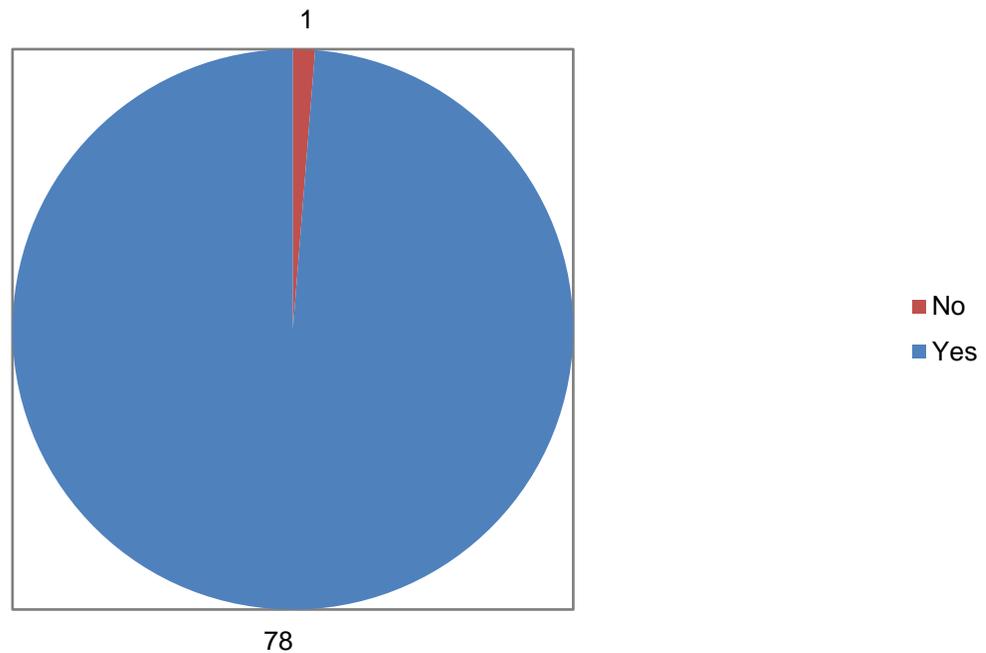
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ATTENDEE SURVEY RESULTS AND FEEDBACK

- I think this is a nice offering but I wonder if a roundtable would be more effective than 1:1. Believe it or not, I met some shy(ish) people at Institute. Plus... even if I don't feel the need for a capital-M Meeting, sitting in on a focused conversation could be inspiring to quite a few folks. Maybe use one of the day's lunches (like Wednesday?). Lengthen lunch to 90 minutes, release last class 30 minutes later and boom - you have a working lunch with conversation leaders at each table. More noodlin'.
- I took advantage of this opportunity and felt it was very worthwhile and the industry constant did a very nice job and asked thoughtful questions.
- On the second to last day of class it was mentioned that industry consultants were available. Use a piece of paper to sign-up. Really? You couldn't place this kind of "poll/request" in the app, with some descriptions of who was there to consult with and on what topics? Plus, where was there time in the daily agenda to work this in? Over a break where you had to spend 10 minutes just to find any refreshments?

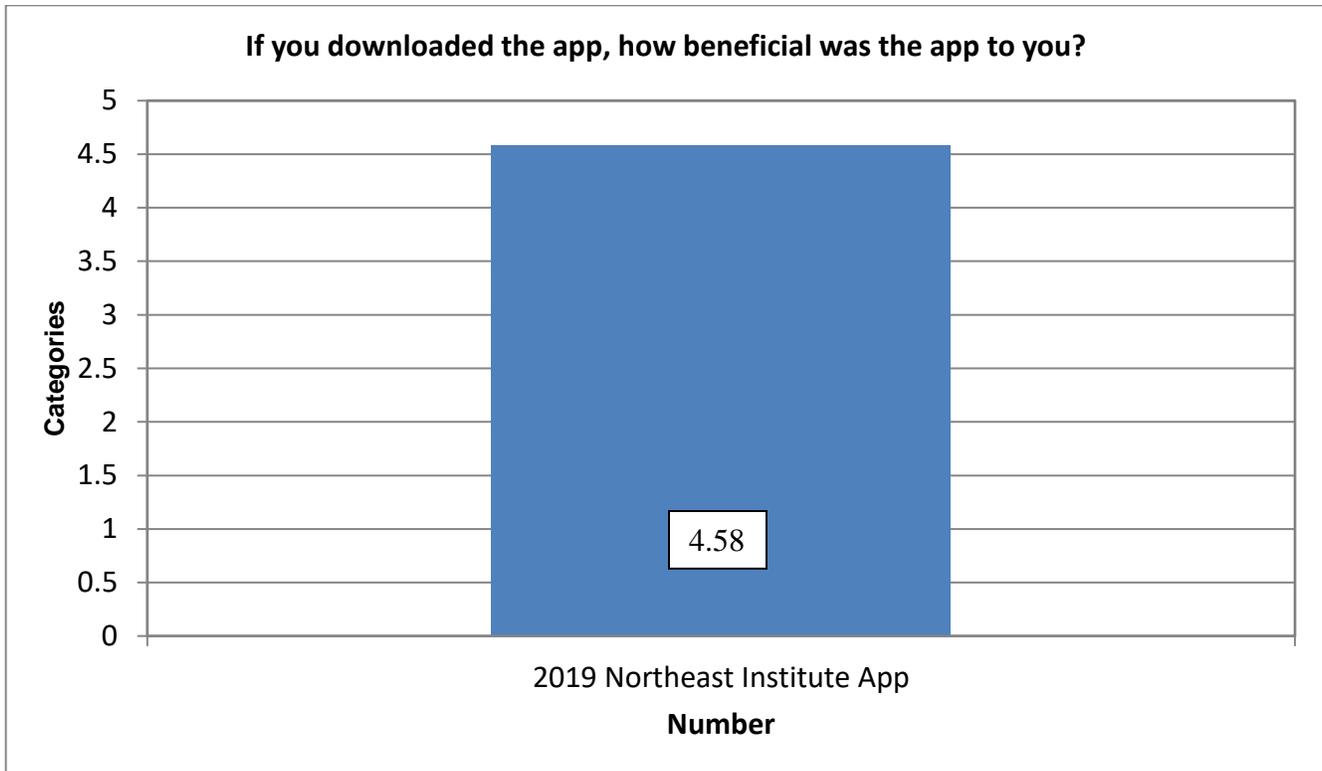
Did you download the 2019 Northeast Institute App?



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ATTENDEE SURVEY RESULTS AND FEEDBACK



Q16: Additional comments about the app*:

- Loved the app! Great job!
- It was not communicated what the app was called or how to download - everyone in our class struggled with this.
- Very useful tool!
- Very helpful to use the app as the dashboard for the week. The ability to review and download materials specific to each session was great.
- I prefer this app over all of the previous year versions.
- I thought the app was great!
- Very difficult to use - did not work the same on mobile and laptop devices. You had to log in EVERY TIME you opened it and with only one week to get used to it - frustration was high. Also, while I liked the option of using it for bids on auction items, it took away from the fun and competition of the auction by not having the items on display at the big bash.
- Love it!
- It kept logging me out - it was very annoying.
- App was much improved this year. Especially helpful to be able to sort by year.
- The app was not user friendly. Navigation wasn't great and you couldn't have more than one document open at a time.

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- It is probably human error on my part but I found it a little challenging to navigate and had to get a new passcode # each time I went back on it.
- I liked the app and I used it as well in Athens. As I noted earlier, I would have liked to have received it much earlier though.
- I wish the app would also sort attendees by class.
- Again more training should have been given in homeroom at the beginning of the week.
- I used the app often to make check out the schedule and make sure I had the right materials.
- I felt like an idiot the first morning because I read the 'whole' schedule, not 'my' schedule and ended up in the wrong room. But I recovered quickly. I found it VERY helpful as the week went on!
- It was not user friendly for the purpose of "buying" stars. But it was helpful with easily accessible class and attendee info.
- Loved that I could see all my classes at my fingertips. Also, perhaps load a map of campus into the app with the City map.
- It is the only thing that kept me on track! :) I downloaded the materials directly from the app and emailed to myself. Loved the survey capabilities. Hmm... I may have forgotten to assess my last class. Let me do that now. Sorry.
- The app was wonderful! I did not download it until I arrived in Pennsylvania, however, I used it every single day and found it tremendously helpful. Well done!
- Loved it!
- LOVED the APP!
- The app was terrific and incredibly useful. It was great to be able to do the surveys in the app immediately following the course, or later in the evening, to access it whenever was very helpful.
- The desktop version was easier to use than the mobile version for class materials, etc. In the mobile version, you kept having to download the campus map and transportation schedule, which was a little clunky.
- Great response time on the fire alarm and using the app to notify us that it was not an emergency. The app worked quite well.

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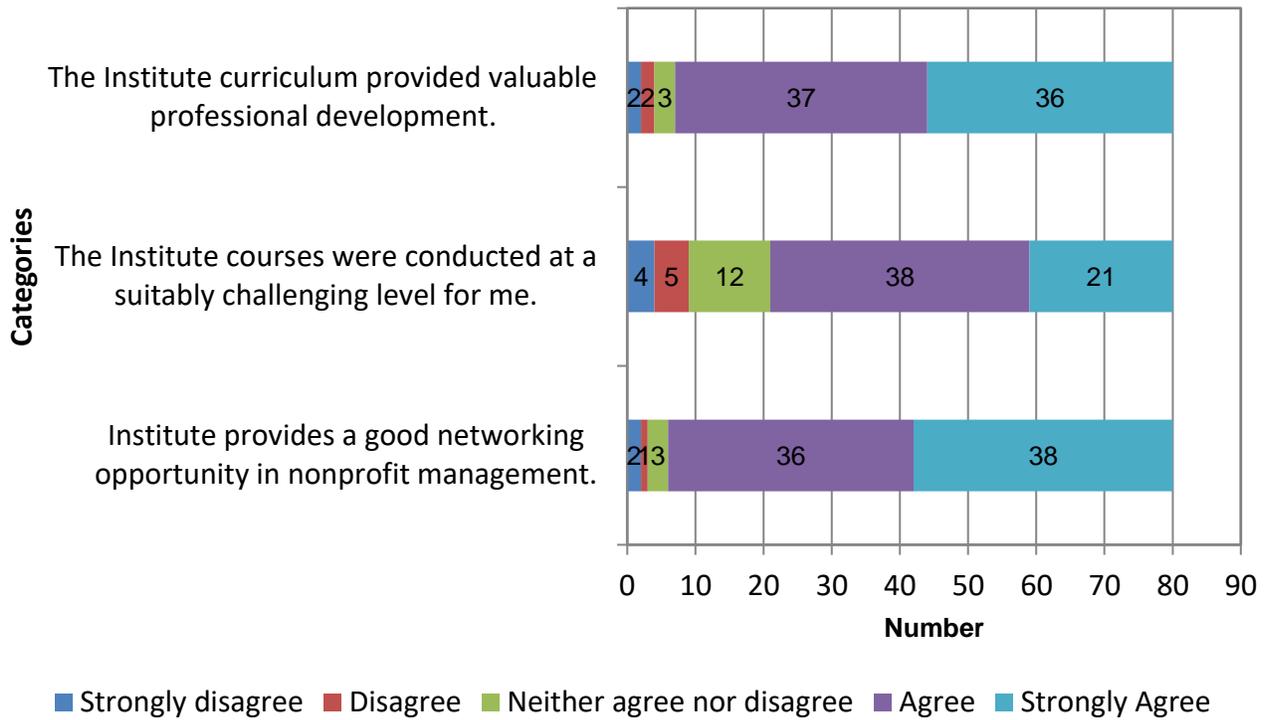


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ATTENDEE SURVEY RESULTS AND FEEDBACK

Rate to what degree you agree with the following statements.



Answer Category	Choices					Totals
	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	
The Institute curriculum provided valuable professional development.	2 (2.5%)	2 (2.5%)	3 (3.8%)	37 (46.3%)	36 (45%)	80
The Institute courses were conducted at a suitably challenging level for me.	4 (5%)	5 (6.3%)	12 (15%)	38 (47.5%)	21 (26.3%)	80
Institute provides a good networking opportunity in nonprofit management.	2 (2.5%)	1 (1.3%)	3 (3.8%)	36 (45%)	38 (47.5%)	80
Totals	8	8	18	111	95	240

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Q20: Additional general comments*:

- I rate the educational content 7/10. Some speakers were outstanding and provided a wealth of knowledge. Housing, transportation and meals are rated 3/10.
- --The construction there a wrench in things - the dining hall was pretty far so they should have allowed more time at lunch.
--Cut the breaks to 15 or 20 minutes.
--Move class dinner back to Monday night or even Sunday night if you're not doing the reception - allows for more time to get to know your classmates - crucial for 1st years especially since the opening reception was taken away.
--Communication for the week was lower than usual, caused some confusion.
--The class on IT wasn't very helpful or applicable for 4th years, should dive more into different systems that work for chambers and associations.
- One hour to walk 20 minutes to lunch and eat really quickly and get back to class was not enough time. Lunch was stressful rather than being a break. Ended up spending additional money for lunch on Wednesday just so we didn't have to be so rushed.
- The amount of walking expected from West Campus Apartments to business school to dining hall was not realistic for middle age professionals trying to dress business casual in the heat of summer. Also, the schedule did not allow enough time. A one-hour break for lunch is not sufficient when just the walking part takes 20 minutes each way. Need to plan times for transition/walking into the schedule. Food at Villanova was extremely mediocre. Can you bring in box lunches for a similar price? Would eliminate some of the worst of the walking (time pressure and big hill) and allow for more time for networking. On the flip side, the snacks were lovely and very generous -- if I had known how substantial of a snack was on its way later in the day, I probably would have skipped the lunch every day.
- Two of the core classes did not provide the "takeaways" I had wanted. I thought the first year curriculum was stronger than the second year. The customer service was very basic. Effective Government Advocacy also did not provide the takeaways I was looking for. The man teaching the course was interesting and personable, and did a great job with a/v issues. But neither course provided me the "bang for my buck," I was looking for. Please incorporate Justin into third and fourth-year core classes. He has great takeaway items to implement. Throughout all classes, it seemed to be more geared toward Chambers and some things can't be applied to associations. Would love to see more geared toward associations, but I realize this is hosted by the chamber. Overall a good experience, and I look forward to the next two years.
- The lunch break could have been longer. Once I walked there I only had 10-15 minutes to eat. Box lunches at Bartley Hall would have given more of an opportunity to enjoy lunch and network with peers.
- Please plan the meal portion better. An hour to walk down to Donahue Hall from Bartley Hall and back isn't really reasonable, especially in the heat.

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- Some of the classes were helpful and others were just useless. There was a complete lack of "best practices" in several of the courses. I feel like the "soft skills" courses were way better than those that were intended to be meaty. I did not learn a whole lot. Many of the core courses and even some electives assume that we are all beginners. This surprised me for year 2. There is no assumption that attendees have learned anything outside institute in the last year. I won't comment on specific instructors here as I did so on each class survey. I really think you should consider leaving Villanova. The 12 minute walk to and from lunch is hard when you have an hour to eat. The cafeteria food options were severely lacking (thank god for the salad bar). I brought my own breakfast because getting over the cafeteria for breakfast was inconvenient (I had to bring a cooler to do this because the Radnor wanted to charge me \$25/day for a refrigerator). The construction was problematic with noise, power outages, and inconvenience of getting around. A better location (even closer to an airport for those who fly) would be a good thing to consider. Overall, I attend institute because I want the CAE hours and because my org offered it to me. I am considering not returning to complete the program as I probably already have enough hours to sit for the test. I don't want to lose an week of my summer if I am not learning a whole lot.
- Oops I failed to make a comment about the app. Suggest not including the privacy feature in future years - leave contact info "open" as before, and individuals can edit it as they wish. Save us the extra steps of trying to find someone's contact info if we need to follow up with them later. Those steps can be barriers to task completion and therefore lost opportunities to connect. IOM is an amazing experience. I'm very proud to be an official IOM grad!
- As a 4th year, proud to have earned my IOM, I must say I was disappointed with the experience this year relative to programming and "official" IOM things. First, the lack of kick-off didnt get the networking going early enough. Not an issue for our class, but definitely for the first years. Also, I heard from many first years that they won't be back. The situation at Villanova was not the best. I understand there may be contract limitations, etc, however, with the walk to the dining hall, there should have been considerations to how that impacts time. Perhaps lunch should have been extended by 15 minutes. Also, with the main entrance to Bartley being closed, it was difficult to have outside time on the breaks. In years past, a lot of networking and opportunitites to gel with attendees other than your class happened on the steps of that hall. It was always a nice break time. This year, we remained inside and I think that was tiring for some. Also, the condition of the rooms were in some cases, disgusting. The balls of hair on the bottom of the chairs in the classrooms and the clumps of dirt that hadn't moved since last year were bothersome. Lastly, I would suggest that if in fact Institute is going to remove the kickoff event, then the class dinner should be held on Monday evening. That way, there is more time left at IOM after the dinner than has already passed. I hope that makes sense. By the time the class gels on Tuesday night, it's almost time to go home. Overall, I loved my time, my class, and now my certification. Thank yo for all you all do.
- I think the new location for the graduation ceremony was great. As a graduate this year, I appreciated the love and attention from IOM staff and board of regents. They worked hard to make it feel special. The busing situation was horrible as I'm sure the staff is well aware. That was the only negative in an otherwise fun evening.
- Institute was great. The curriculum was very well chosen and exceeded my expectations. Presenters were awesome and IOM staff were very welcoming. The networking is so valuable. I liked the

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accommodations. A few suggestions. Could we get a dorm closer to our classroom next time? Also - I only used the cafeteria one time - too far to get there and get back. I wish we would have had one evening of down time. That was my first time in that area and I did not have time to explore / relax. I know that is not why we were there but I felt it was a really packed week and a few hours to ourselves would be refreshing. I was very disappointed by the use of cell phones while people were presenting, both in the classroom and even during the graduation ceremony some people (some leaders) were on their phones while people were giving their remarks. Perhaps we could make this a more strongly suggested issue next time. I realize people need to have phones nearby but some people were doing work while listening to instructors and it was rude to the presenters and distracting to me. Overall great experience and I appreciate all of the time and effort it took to plan it.

- I have attended three different sites and I have to admit that the Tucson and Athens sites were more energetic. Music played in the AM and it was very exciting. Each class participated in t-shirt day and it seemed that the F&B was better at Athens and Tucson. It felt like the NE site were slim pickings having attended and experienced the other sites. Just different I guess. It was not a terrible experience by any means, but I just think the food options were much better. Great job to the staff and volunteers. Everybody did a great job and it was very enjoyable.
- Due to the logistics of this locale, I would recommend researching other venues that were easier to navigate. The main focus of the attendees should be on learning and networking not on how am I going to get to class.
- 1 hour for lunch is not enough time, especially when you factor in travel time to/from the dining hall. I would suggest shortening the breaks in the morning and afternoon to give us more time to enjoy lunch, rather than inhaling it.
- I would have like to have used my dinning card at the Exchange diner in the building. My stomache couldn't handle "kiddy camp food" so I after the 1st day, I went to that Curly Exchange Stop and Go or went off campus. Could you look into that for future years?
- Thank you for the opportunity to attend, learn a lot, and meet some amazing people that are my IOM family!
- The customer service class was ok, but it was more like a customer service 101. I think to survive in this industry, you already have to have great customer service skills or you wouldn't make it to year 2. I think what would have been more effective for me would be a crisis management course or a conflict resolution course.
- I know it's hard with 150+ Type A leaders to deliver engaging value time after time. And students (like me) raise the bar each year when we come back. Several of my classmates commented that the coursework was elementary and that they wanted something more demanding. I think we could do both. Carefully managed, we can provide vocabulary, a conceptual framework, industry roundtables and ask that students think critically and deliver some kind of 'thing' in at least some of their classes. One my Events Strategies class, groups of us "built and marketed" an event in 15 minutes. That kind of thing is inspiring and got blood moving and provoked questions. If I haven't said so: Thank You. I am grateful to have Institute to help me grow in my job. I am 53 and less than 3 years in the industry. There is much to learn (and in a small shop in a rural area, there are not always people with whom you can share openly). I have made good friends, good contacts and good memories at IOM. And 2020 is on my calendar already!

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- My first year at Institute was worthwhile and memorable. [Removed] was a terrific class advisor, and all of my instructors were friendly, knowledgeable, and engaging subject matter experts. In every class, I learned many things I did not already know or gained better insights and perspectives on the things I did know. I really appreciated the fact that the attendees were there to LEARN and to make connections that would be meaningful for themselves professionally or their organizations. The caliber of everyone was absolutely top-notch and a group I am proud to be included in. The food and snacks provided each morning and during our breaks was fresh and plentiful and very much appreciated. The food in the cafeteria was adequate and the salad bar rivaled most restaurants I've seen. The walk to the dining hall was indeed a bit far considering the temperatures and the time it took to walk even briskly back and forth. Thankfully we had no rain! The rooms our classes were held in were comfortable considering the scorching heat, and the building was easy to navigate. The only issue was the building had only one set of bathrooms per floor which caused a few backups during the break time. The shuttle service was very timely and convenient and the drivers were wonderful. There was that one time where the driver misunderstood the timing of the first pickup at the graduation/bash, but otherwise, the service was impeccable. My recommendation for the fundraiser is to perhaps request items from all attendees, and then put together packages of books, snacks, food, or memorabilia with contributions from many in addition to having attendees bring submissions they have created. The result would be more items to showcase. I also recommend changing the fundraiser from a silent auction to a raffle where tickets can be purchased and then put into a box next to the item of interest. This way each item raises some money and attendees have a better shot at getting something they want. Overall, I had an excellent experience. I enjoyed having access to the brain trust of our industry both in class and outside of class during breaks and meals. Everything was well-planned and the attention to detail was apparent. The resources provided will help me in my role at my chamber for years to come, and I can't wait for year two!
- I found a few of the speakers this year less organized and informative, more interested in talking about themselves than in offering useful information to be applied by students to their own experiences (I noted that in the speaker surveys). In terms of future topics, I suggest the following: DIVERSITY (as customers/staff, including sex, race, gender); MILLENNIALS/FUTURE GENERATIONS (as customers/staff), and apps (what functions/services/member benefits can be executed/supplied by apps in the chamber/association world).
- The Villanova business school classrooms were very dirty and under construction. Not a good setting for this group.
- Most of the core classes pertained to me, but a few did not. I would like more options for accommodations that include bussing, as my room at the Radnor was not the nicest.

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- Northeast institute, due to its 50/50 split of associations/chambers needs a different model than the other locations. There was one speaker in particular, [removed], who had absolutely ZERO experience in the association world and therefore half of our class (2.1) myself included, learned 0% from this class. His focus was 100% on chambers and golf tournaments. He couldn't speak at all to the purpose of education programs or their use. Just told associations they need to be doing golf tournaments! What? The other instructors do a fabulous job at knowing the audience is 50/50. I specifically want to call out [removed] who had BOTH association and chamber experience! Brilliant! These are the speakers you really need to find! If this is not possible, please simply split the class into two - one for associations and one for chambers. Just remember that association people come to Northeast regardless of where they are in the country b/c it is widely known that Northeast is where Association people attend.
- More thought should be given to the knowledge depth that the presenter/facilitator should have on their given subject, and how it relates to the level of the individuals (which year class) they are presenting to. A lot of the subjects this year for Class 3 were basic. If we're already in Class 3, we probably have a basic understanding of most subjects. Also, more thought should be given to applying Adult Learning Principles for the classes, including electives. Sitting in a room for 4 hours on end, with only a 30 minute break, and no small group activity breakouts or sparks/questions for open discussion/sharing, etc., is mind numbing.
- The distance between hotel/dorm/program was less than ideal. There must be a better location in the northeast to hold this program that can keep things closer together.
- The classes/education was great. The execution of the event was one of the worst I have experienced in my 20+ years of events. The cost should be increased to include the following; opening networking reception, transportation to class and events and the closing party (2 drink tickets and a cash only bar). Also, given the focus on not being late to class - we should not have had to walk 15-20 minutes, both ways in the heat to have lunch. This really could be a top ranked event if you guys focus on increasing the overall experience...
- I feel the speakers should teach one session not several since there was overlapping which caused some to run out of time. Some information was redundant when I needed them to cover the rest of their material. It is a beautiful campus but do not ask your participants to hike to class or the dining hall. There is a lot of information to take in and the session are all day so you need to take that into consideration of participants being tired let alone hiking to get to where they are staying. It should not be the case where so much extra monies is required to get around to attend functions.
- While most of the faculty seemed to have good insight to offer, because anyone can attend, much of the curriculum was far too basic for an executive. There should be an executive level track or pre-requisites for courses. Having a C-level person with years of experience alongside someone with one or two years career experience makes it hard for the faculty to meet both needs and results in the exec not learning and the newer person missing out.

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- After attending Southeast Institute last month, this site was very disappointing. At Southeast, we were greeted each morning with music and staff lined up giving us high 5's! It was upbeat and exciting. There were snacks at the back of every classroom to keep you going all day. Each class did class t-shirts. The lunch was buffet style and amazing! Northeast was the opposite. No excitement. No class t-shirts. No snacks in the room besides the Hershey Kisses our adviser brought. The food was horrible. AND you had to spend 10 minutes each way walking to the cafeteria. A huge let down after attending Southeast. I don't feel like I got my money's worth.
- It is time for an instructor refresh. Some of the instructors provide the same material regardless of the course, so true new learning was minimal.
- Incredible experience that I've already put to good use. Thank you!
- I felt that some of the required classes were not as valuable. For example, Customer Service while a great class should be an elective. Almost everyone in the class felt that they did not take much away from the class. While [removed] class Delivering Value should be someone everyone is required to take. It would have been great to discuss that for 4 hours instead of just 2. All groups are struggling with relevance and member value.
- I felt like the course description (in many cases) didn't adequately describe what was actually discussed in the classroom. Although I enjoyed the topics presented, I thought E140 and E244 were something other than what was presented. I think C380, C341 and C330 should be taught earlier in the curriculum. I felt too much emphasis (about an hour) was placed in E140 on accreditation and certification. I thought we were going to talk benchmarking more than we did.
- The classes were fantastic although there were two instructors who were not my top favorites as far as what I took away from the class. I noted that in my course reviews. The breaks were perfect... and the food/snacks helped a lot. The bus service during the week was great to and from the hotel. As a first year there were things I wish I had known... what shoes to pack and not to pack for example! Good restaurants walking distance from the hotel. What to do if you have an extra day to explore the area (as I did). Maybe the 4th years could write up a fun TOP 10 things I wish I had known my first year!
- Dining hall was an issue with travel time.
- The timing for breakfast and lunch needs to be amended based on the availability of dining hall locations. With only an hour, it was insane to walk 20 minutes to the dining hall, leaving 20 minutes to eat, then walk 20 minutes back to make it into class on time. Add in the heat, and there were some very grumpy individuals. I realize this is out of your control, and depends on construction and the university, but if this is the case, perhaps catering like the breaks/snacks would be a better option. As for courses, it would be nice if there is a way for the institute staff to reach out to faculty to let them know how many people from the core course will be taking the elective. Or, if there is a disclaimer to the attendee that you should not take an elective and core class from the same faculty member. I enjoyed both sessions, but it was a complete repeat of the information from "Is this legal" and "Executive Law." Additionally, half of the class had been in the core course earlier that morning, so it was not just a one-off scenario.
- Going into my third year of IOM, I was ready to tackle more challenging issues, dig deeper into concepts, work through case studies, etc. Overall, the course content was less rich than expected this year, which was disappointing because my previous experiences have been so great.

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