Prospective Student Toolkit
for Nonprofits
Institute for Organization Management

U.S. CHAMBER OF COMMERCE FOUNDATION

#IOMeducates
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GENERAL OVERVIEW ANDFAQS

WHAT IS INSTITUTE?

Institute for Organization Management (Institute) is the premier continuing education experience for association professionals. Since 1921, the Institute program has educated and empowered association executives with the knowledge and skills they need to be leaders in their organizations and industries.

The Institute curriculum is comprised of four week-long sessions. Each session is five days and is offered at four locations across the country annually. With courses on topics such as advocacy, media training, membership, finance, legal issues, human resources, and much more, Institute ultimately educates participants on all facets of running an association. To view a full listing of course offerings, click here.

WHAT IS THE BENEFIT OF ATTENDING INSTITUTE?

Association professionals who attend Institute receive an increased capacity to better lead their associations and influence their industries. After participating in four Institute sessions, attendees earn the IOM recognition, which signifies 96 hours of nonprofit management training.

Institute’s curriculum is directly tied to the body of knowledge for the CAE (Certified Association Executive) exam. Furthermore, Institute is an approved CAE provider, which means that all courses can be applied to the credit hours needed to sit for the exam. Association professionals who graduate from the program receive 96 credit hours toward the CAE certification.

HOW LONG DOES IT TAKE TO GRADUATE FROM THE INSTITUTE PROGRAM?

Typically, participants attend Institute once a year for four years. However, association professionals looking to fast-track their growth may attend multiple sites in a year. It’s up to the participants to decide what pace is best for them and their organizations. For a general schedule of the week, click here. To view upcoming Institute sessions, click here.
**WHO ATTENDS INSTITUTE?**

Association, chamber of commerce, and other nonprofit professionals all attend Institute. Class members represent a mix of nonprofit professionals in an effort to enhance networking and learning opportunities.

**WHO TEACHES AT INSTITUTE?**

Institute faculty are comprised of industry experts, leading practitioners in the association and chamber industries, consultants, and university professors. [Click here](#) to view a listing of this year’s Institute faculty.
REASONS TO ATTEND

WHAT’S IN IT FOR YOU?

You will benefit from attending Institute in the following ways:

- You will receive instruction from and engage in discussion with leading industry experts who understand how to help you be successful in your career.
- You will develop a network of peers throughout the country you can turn to for advice and guidance in your pursuit for excellence.
- You will earn 96 credit hours toward your CAE.
- You will become a more valuable employee as a result of the knowledge and skill set gained.
- You will graduate with the IOM recognition, demonstrating your commitment to and understanding of how to lead a nonprofit.

“As a 501(c)3 employee, Institute provides me an education on proper organizational management and operations procedures.” - Erika Lyn Flaherty, Executive Assistant, Wisconsin Historical Foundation

WHAT’S IN IT FOR YOUR BOSS?

Your boss will benefit from sending staff to Institute in the following ways:

- Staff members will learn best practices in the nonprofit community to help increase membership, generate non-dues revenue, cut expenses, create more value for members, and improve existing programs.
- Staff members will gain a greater knowledge of governance and finances, thus helping to ensure the organization is legally protected.
- Staff members will be mentored by industry experts.
- Staff members can earn 96 credit hours toward their CAE.

“The information I received in the financial courses last year allowed me to redesign an existing program which brought in the same amount of revenue, but we were able to reduce our UBIT (unrelated business income tax) significantly. We saved enough to more than cover the cost of attending Institute all four years. Now that’s what I call ROI!” - Michelle Donohue, IOM, CAE, Accounting and Operations Manager, California Hotel and Lodging Association
WHAT’S IN IT FOR YOUR BOARD?

Board members will benefit from sending staff to Institute in the following ways:

- Nonprofit staff will gain a better understanding of governance and finances, thus helping to ensure the organization is legally protected.
- Nonprofit staff will learn about non-dues revenue programs that will aid in increasing the organization’s revenue.
- Nonprofit staff will learn how to increase membership recruitment and retention.
- Nonprofit staff will learn how to better lead and manage their teams.
- Nonprofit staff will learn how to effectively advocate for policies on city, state, and federal levels on behalf of the organization’s members.

“Having employees who can look at issues with a 360 degree perspective is both beneficial to your board and critical to the success of your organization. IOM allows for exactly that type of growth and learning in a way that provides immediate impact.” - Tracey Halliday, IOM, Vice President, Communications, American Beverage Association (DC)

WHAT’S IN IT FOR YOUR MEMBERS?

Your members will benefit from staff attending Institute in the following ways:

- Staff will be kept abreast of industry trends and how to effectively translate those trends into success for the members.
- Staff will learn how to effectively advocate for policies on city, state, and federal levels on behalf of the organization’s members.
- Staff will gain a better understanding of how to increase the return on investment members receive from paying dues.
- Staff will learn how to more effectively develop value-based meetings.
- Staff will learn of programs that have benefited members of other organizations throughout the country and will be able to adopt those practices to meet the organization’s needs.

“Attending Institute each summer always meant that I came home energized and with a list of new concepts and new ways of thinking. I was able to “borrow” some great ideas from my classmates that I was then able to build into my programming to make it a richer experience for our membership.” - Teresa L. Eyet, IOM, Vice President, Conference Programming and Education Development, American Health Care Association (DC)
CURRICULUM

Institute’s curriculum is aligned with the knowledge requirements for the CAE and CCE nonprofit industry certifications. Each year attendees take six core courses and select three electives courses, one from each group. Electives allow participants to further their professional development by focusing on particular areas of interest. Upon graduation a student will have earned a total of 96 credit hours.

First-Year Core Courses
C110  Financial Fitness
C125  Hiring, Firing, and Everything In Between
C130  Unleash the Leader Within
C150  Communicating with Confidence
C180  Guide to Governance
C185  Recruit, Engage, and Retain Your Members

Second-Year Core Courses
C220  Is That Legal?
C230  Managers Who Motivate
C250  Customer Service Inside and Out
C260  Marketing Strategies
C261  Events: Strategy and Operations
C270  Effective Government Affairs Programs

Third-Year Core Courses
C310  Budgeting and the Bottom Line
C330  Everyday Ethics
C340  Strategic Planning
C341  Building Strategic Partnerships
C360  Culture of Innovation
C380  Volunteer Development

Fourth-Year Core Courses
C420  Current Legal Issues Facing Your Org.
C430  Becoming a Strategic Leader
C441  Industry Forecast
C460  Integrating Strategic Technology Solutions
C470  Advocacy and Alliances
C490  Organization Leadership for the Future

Group One Elective Courses
E110  Revving Your Revenue Stream
E120  Executive Law
E126  Dealing with Challenging Employees
E140  Building Organizational Excellence
E142  Fundamentals of Community and Economic Development
E150  Diversity, Equity, and Inclusion
E163  Communicating Through the Media
E180  Building Better Boards and Committees

Group Two Elective Courses
E210  Executive Finance
E211  Sponsorship Solicitation
E230  Managing Upward
E240  Strong Associations for the Future
E241  Strong Chambers for the Future
E243  Developing a Competitive Workforce
E244  Using Data to Grow and Sustain Your Org.
E250  PACs and Political Endorsements

Group Three Elective Courses
E310  Evolving Membership Models
E330  Keys to Delegation and Empowerment
E331  CEO Lessons Learned
E340  501(C)(3) Foundations
E342  Advanced Strategies of Community and Economic Development
E350  The Art of Persuasion and Negotiation
E360  Strategic Communications
E362  Policy Development and Implementation
E380  Delivering Value
### Dates and Deadlines

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<tr>
<th>Winter Institute</th>
<th>Midwest Institute</th>
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<tbody>
<tr>
<td>University of Arizona</td>
<td>University of Wisconsin</td>
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<tr>
<td>Tucson, AZ</td>
<td>Madison, WI</td>
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<tr>
<td>January 5-9, 2020</td>
<td>June 7-11, 2020</td>
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<tr>
<td>Scholarship Deadline: October 18, 2019</td>
<td>Scholarship Deadline: March 20, 2020</td>
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<td>Early Enrollment Deadline: November 15, 2019</td>
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<td>University of Georgia</td>
<td>Villanova University</td>
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<tr>
<td>Athens, GA</td>
<td>Villanova, PA</td>
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<td>June 28- July 2, 2020</td>
<td>July 26-30, 2020</td>
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<tr>
<td>Scholarship Deadline: March 22, 2019</td>
<td>Scholarship Deadline: April 24, 2020</td>
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<td>Early Enrollment Deadline: April 19, 2019</td>
<td>Early Enrollment Deadline: May 22, 2020</td>
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COST

The cost to attend Institute is $1,395.00 for U.S. Chamber members and $1,845.00 for nonmembers. Tuition increases by $200.00 after the early enrollment deadline.

The enrollment fee includes tuition, materials, scheduled meals, breaks, and receptions. Attendees are responsible for transportation to and from site, housing, non-program meals, and incidental expenses.

Below is a breakdown of what is included in the enrollment fee.

WHAT’S INCLUDED

- Nine classes with experienced and knowledgeable faculty members
- 24 continuing education hours toward the CAE (96 total)
- Some meals and breaks*
- Graduation and Big Bash celebration dinner
- Transportation between campus and host hotel(s) when not within walking distance

ADDITIONAL COSTS

- Travel to and from site
- Lodging
- All but one dinner (opening night, class dinner, and free night)
- Additional activities
- Incidents

*Schedule varies by site. Please contact the Institute office at ionr@uschamber.com for details on a specific site.