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

INSTITUTE FOR ORGANIZATION MANAGEMENT
WINTER BOARD MEETING
FEBRUARY 4, 2020

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BOARD OF TRUSTEES

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

2020 ROSTER

CHAIR

Jeremy L. Arthur, IOM
President and CEO
Chamber of Commerce Association of Alabama
2 North Jackson Street, Suite 603
Montgomery, AL 36104
334-240-8758
jarthur@bcatoday.org
Term: 2019-2020

VICE CHAIR

Kelle Marsalis, IOM, CCE
President and CEO
Plano Chamber
5400 Independence Parkway, Suite 200
Plano, TX 75023
972-424-7547 ext. 234
kellem@planochamber.org
Term: 2019-2020

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: 2018-2020

CHAIR ELECT

Matt R. McCormick, IOM, CCE
President
Columbia Chamber of Commerce
300 South Providence Road
Columbia, MO 65205
573-874-1132
mmccormick@columbiachamber.com
Term: 2019-2020

PAST 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: 2019-2020

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: 2018-2020



BOARD OF TRUSTEES

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

2020 ROSTER

Ryan Evans, IOM

Executive Director
Chambers for Innovation and Clean Energy
11509 South Black Forest Drive
Sandy, UT 84094
801-509-1201
revans@chambersforinnovation.com
Term: Through 2020

Jeffrey Griffin, IOM

President and CEO
Peoria Area Chamber of Commerce & The CEO
Council
403 NE Jefferson Avenue
Peoria, IL 61603
309-495-5920
jgriffin@peoriachamber.org
Term: Through 2020

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: 2019-2021

Robert Medler, IOM

Vice President
Tucson Metro Chamber
212 East Broadway Boulevard
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

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: 2015-2021

Jack Lank, IOM

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

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

2020 ROSTER

Douglas O'Flaherty, IOM

South Carolina Director of Operations
South Carolina Restaurant and Lodging
Association
PO Box 7577
Columbia, SC 29202
803-765-9000
doug@scrla.org
Term: Through 2020

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

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

Gene Terry, IOM, CAE

Executive Director, American Society of Hand
Therapists
Association Headquarters, Inc.
1120 Route 73, Suite 200
Mount Laurel, NJ 08054
856-380-6840
gterry@ahint.com
Term: 2018-2020

Scott Waller, IOM

President and CEO
Mississippi Economic Council
PO Box 23276
Jackson, MS 39225
601-969-0022
swaller@mec.ms
Term: 2015-2020

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: 2017-2020

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: Through 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

BOARD OF TRUSTEES AGENDA



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

2020 WINTER MEETING

FEBRUARY 4, 2020
11:30 A.M.–1:00 P.M. EST
CONFERENCE CALL

I. Welcome and Introductions

Jeremy Arthur, IOM, CCE

Chair, Institute for Organization Management

President and CEO, Chamber of Commerce Association of Alabama

II. Approval of Minutes – October 4, 2019

III. Approval of Nominating Committee Report

IV. Program Updates

- a. Marketing
- b. Social Media
- c. Scholarships and Fundraising
- d. Institute Programming Committee
- e. Curriculum

V. Boards of Regents' Reports

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

VI. Chairman's Report

VII. Other Business

VIII. Adjournment

Next In-Person Meeting: September 25, 2020 in Washington, D.C.

BOARD OF TRUSTEES



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

FALL 2019 MEETING MINUTES

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

In attendance: Megan A. Lucas, IOM, CCE, CEcD; Jeremy L. Arthur, IOM; Matt R. McCormick, IOM, CCE; Christin W. Berry, CAE; Rich Cantillon, IOM; Steve Clark, IOM, J.D., CFE; Kimberly Dahlsten, IOM; Tony Felker, IOM, CCE; Mark L. Field, IOM, CCE; Christine Kennedy, IOM, CCE, CPC, ELI-MP; Jack Lank, IOM; Kelle Marsalis, IOM, CCE; Robert Medler, IOM; Peter J. McNamara, IOM, CAE, J.D.; Stephanie M. Parton, IOM, CAE; Jodie A. Perry, IOM, CCE, CCEO-AP; Scott Waller, IOM; Angela Whitcomb, IOM; Raymond P. Towle, IOM, CAE; Karyn K. MacRae, IOM, CAE, CMP; Katelynne G. Cox, IOM; Mandy Pan; Andrew Y. Weller, IOM; Megan Kastner

Not in attendance: DJ Johnson, IOM, CAE; Crystal Moore, CAE; Gene Terry, IOM, CAE; Chris E. Wallace, IOM, CCE

Observers: Erin Carney, IOM; Teri H. Smiley, IOM, GCCE; Ryan Evans, IOM; Douglas O'Flaherty, IOM

I. Welcome and Introductions

Megan A. Lucas, IOM, CCE, CEcD welcomed everyone to the meeting and introductions were made. Recognition was given to the incoming Board of Regent chairs who were invited to observe the meeting.

II. Approval of Minutes

The February 5, 2019 minutes were unanimously approved.

III. Approval of Nominating Committee Reports

The Board of Trustees, Curriculum Committee, Midwest Board of Regents, Southeast Board of Regents, West Board of Regents, and Northeast Board of Regents nominating committee reports were all approved with no changes.

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

BOARD OF TRUSTEES



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

FALL 2019 MEETING MINUTES

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*

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

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

BOARD OF TRUSTEES



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

FALL 2019 MEETING MINUTES

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)*

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
Plainville, 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*

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

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 TRUSTEES



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

FALL 2019 MEETING MINUTES

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*

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

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

BOARD OF TRUSTEES



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

FALL 2019 MEETING MINUTES

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

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 O'Flaherty, 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*

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

BOARD OF TRUSTEES



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

FALL 2019 MEETING MINUTES

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

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

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

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

BOARD OF TRUSTEES



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

FALL 2019 MEETING MINUTES

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

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

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

BOARD OF TRUSTEES



U.S. CHAMBER OF COMMERCE FOUNDATION
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Ray Villegas, IOM
Term: 2015-2019

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

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

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

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

BOARD OF TRUSTEES



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

FALL 2019 MEETING MINUTES

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

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

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

BOARD OF TRUSTEES



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

FALL 2019 MEETING MINUTES

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

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

ROTATING OFF BOARD

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

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

IV. Consent Agenda

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

V. Curriculum Committee Report

Jeremy L. Arthur, IOM, CCE, Chair of the Curriculum Committee, gave an update on yesterday's Curriculum Committee meeting. The following changes were unanimously approved and will be implemented in 2020. The board was also updated on the discussion that took place regarding the attendance policy and absence response plan, which will include a member of each Board of Regents serving as the absence response manager.

E330 Learning to Let Go

Title Change: The title of the course has been changed from "Learning to Let Go" to "Keys to Delegation and Empowerment" to signal what expectations attendees should have when taking this course.

C360 Culture of Innovation

Objective Change: Remove the third course objective "Innovate or Die"

Objective Change: The first course objective is now "Defining a creative and innovative culture." The percentage has changed to 25%.

- Remove sub-bullet: "Ways to create a creative and innovative culture"

Objective Change: The second course objective is now "Creating and cultivating an innovative culture." The percentage has changed to 50%.

- New sub-bullet: Leverage diversity and inclusion to drive innovation
- New sub-bullet: Seek out different perspectives

Objective Change: The third course objective is now "Making the business case for innovation." The percentage has changed to 25%.

- New sub-bullet: Using research to determine your members' needs and discern the real costs and returns
- New sub-bullet: Best practices for sustainability

BOARD OF TRUSTEES



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

FALL 2019 MEETING MINUTES

C185 Recruit, Engage, and Retain Your Members

Suggested reading material addition: Add these resources so the course is more applicable to associations.

- *The Art of Membership: How to Attract, Retain, and Cement Member Loyalty* by Sheri Jacobs
- *7 Drivers of Membership* by the ASAE Foundation
- *Exploring the Future of Membership* by the ASAE Foundation Research, John Barnes, Jenny Nelson, Dean West, FASAE, Sheri Jacobs, CAE, Susanne Connors Bowman, and Lisa Dicke, PhD

Faculty recommendation: Faculty member with association experience to teach this course.

Audit recommendation: We will audit this course in 2020 at all sites.

E310 Dues and Don'ts

Title Change: The title of the course has been changed from “Dues and Don'ts” to “Evolving Membership Models” to highlight the ever changing nature of membership.

C341 Win-Win Partnerships

Title Change: The title of the course has been changed from “Win-Win Partnerships” to “Building Strategic Partnerships” to better convey the new objectives.

Objective Change: Remove second objective, “Identifying different types of coalitions and alliances.” and all related sub-bullets.

Objective Change: The first course objective is now “Understanding the importance of coalitions and strategic alliances.”

- New sub-sub-bullets under what are strategic alliances and coalitions?
 - Areas well-suited for partnering
 - Types of alliances and partnerships
 - Building alliances and coalitions within your own organization

Objective Change: The second course objective is now “Implementing steps for effective collaboration.”

- Change sub-bullet: Practical steps for forming, sustaining, *and/or sunseting* a coalition

Objective Change: The third course objective is now “Defining and evaluating outcomes of strategic partnerships.” The percentage is 20%.

- New sub-bullet: Defining a collaborative win

E340 501(c)(3) Foundations

Title Change: The title of the course has been changed from “501(c)(3) Foundations” to “501(c)(3) Foundations Management” to align with what attendees want to learn.

Course Description: The course description was changed by the committee to note this class is for attendees who are looking to start a foundation.

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

Objective Change: Three course objectives revolving around strategic alignment, resource alignment, and programmatic alignment. Sub-bullets have not yet been flushed out. Further discussion is required.

Faculty recommendation: Executive Director of a foundation to teach this course.

BOARD OF TRUSTEES



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

FALL 2019 MEETING MINUTES

E150 Diversity, Equity, and Inclusion

Future discussion: Explored the opportunity to change this to a core class due to the importance of diversity in the non-profit industry. This will be discussed in the spring conference call to be implemented for all 2021 sites. Potential to change a current core class to an elective and change E150 Diversity, Equity, and Inclusion to a core. This will require discussion with the ACCE and ASAE curriculum committee members to ensure that the IOM core continues to reflect the bodies of knowledge for the CCE and CAE certifications.

VI. Updates and Brainstorming

a. West Institute

A discussion took place regarding the status and future of the West Institute site. Staff shared background information regarding the logistical challenges faced over the years. For the first time, trustees received a snapshot of finances (on-site costs only) and learned that due to the high expenses in California and lower attendance numbers, the West site has the highest per person cost. It was also mentioned that the site is not supported by its home state, unlike other Institute sites.

Throughout the discussion, a variety of factors to be considered if West were to close were mentioned, including attendee diversity, support and continued engagement from West Board of Regents members, and the impact on other four sites.

It was made clear that the decision as to whether or not to discontinue the West site would be made by higher-ups at the U.S. Chamber of Commerce and would, unfortunately, be out of the control of the Board of Trustees and Institute staff.

A motion for the Board of Trustees to provide support and stand behind whatever decision is made was passed. Additionally, the board will support the continued engagement of the West Board of Regents. It was noted that if the site were to continue, it would be for a period of at least three to five years and not a “year-to-year” situation with the full support of the entire Board of Trustees.

VII. Chairman’s Report

Megan A. Lucas, IOM, CCE, CEcD thanked all of the volunteers for their roles in a successful 2019 year and welcoming her to each site. She referenced the different personalities and engagement at each site, indicating that personal face-to-face connection is paramount to Institute’s success. In addition, she specifically mentioned:

- 2019 final enrollment
 - 251 first-years
 - 856 overall
- 2020 attendance goals. She recognized that these are based on real data from the past five years. The first-year projections include a 5% increase in order for Institute to strive to continue to grow the program.
 - 263 first-years*
 - 842 overall*

*It was noted that the numbers will be adjusted should West be discontinued.

BOARD OF TRUSTEES



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

FALL 2019 MEETING MINUTES

- She recognized and thanked all volunteers, giving special recognition to the 2019 Boards of Regents chairs:
 - Winter: Nick Kieffer (rejoining in 2-year at-large term)
 - Midwest: Angie Whitcomb
 - Southeast: Christine Kennedy
 - West: Tony Felker
 - Northeast: Pete McNamara

VIII. Looking Ahead

Jeremy L. Arthur, IOM, CCE recognized and thanked Megan A. Lucas, IOM, CCE, CEcD for her year of service as Board of Trustees Chairman and presented her with the Chairman's award. He spoke about the focus and vision for 2020, highlighting first-year recruitment, word-of-mouth marketing, and DE&I initiatives. He thanked the board for sharing their candid thoughts during the difficult discussion regarding West Institute and referenced a continued intentional and transparent relationship amongst volunteers and staff.

Jeremy also encouraged trustees to share their thoughts on ways for them to remain engaged throughout the rest of the year.

IX. Other Business

No additional business was discussed.

X. Adjournment

The Board of Trustees were thanked for their participation and their time. Past chair Chris E. Wallace, IOM, CCE was recognized and thanked for his service, in addition to all other trustees rotating off the board. It was reported that the next meeting will take place via conference call on Tuesday, February 4, 2020 at 11:30 a.m. EST and the next in-person meeting will take place on Friday, September 25, 2020 in Washington, DC.

There being no other business the meeting was adjourned.



NOMINATIONS

2020 BOARD OF TRUSTEES

NEW TRUSTEE

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

ROTATING OFF

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



NOMINATIONS

2020 CURRICULUM COMMITTEE

NEW MEMBER

Lynn Olberding, IOM, CCE
President and CEO
Marshalltown Area Chamber of Commerce
Marshalltown, IA
Term: Through 2021

ROTATING OFF COMMITTEE

Erin Carney, IOM
President
Metrocrest Chamber of Commerce
Carrollton, TX
Term: Through 2020



NOMINATIONS

2021 WINTER BOARD OF REGENTS

Chair

Erin Carney, IOM
President
Metrocrest Chamber of Commerce
Carrollton, TX
Term: 2020-2021

Vice Chair

Lynn Olberding, IOM, CCE
Executive Director
Marshalltown Area Chamber of Commerce
Marshalltown, IA
Term: 2020-2021

Past Chair

Robert Medler, IOM
Vice President
Tucson Metro Chamber
Tucson, AZ
Term: 2020-2021

The following individuals are nominated:

Josh Bonner, IOM
President and CEO
Greater Coachella Valley Chamber of Commerce
Indio, CA
Term: 2020-2022

Dexter Freeman, IOM
Vice President of Operations and Administration
Greater Irving-Las Colinas Chamber of Commerce
Irving, TX
Term: 2020-2022

Term Renewals (two-year term):

Kara Beer, IOM
President
Battle Creek Area Chamber of Commerce
Battle Creek, MI
Term: 2016-2022



NOMINATIONS

2021 WINTER BOARD OF REGENTS

Karri Clark, IOM
Director of Sales and Membership Operations
Bozeman Area Chamber of Commerce
Bozeman, MT
Term: 2016-2022

Josh Driskell, IOM
President and CEO
Jenks Chamber of Commerce
Jenks, OK
Term: 2018-2022

Michael W. Johnson, IOM
President and CEO
National Stone, Sand, and Gravel Association
Alexandria, VA
Term: 2018-2022

Erica Pangburn, IOM
President
Denton Chamber of Commerce
Denton, TX
Term: 2018-2022

REMAINING ON BOARD, NO ACTION REQUIRED

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

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

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



NOMINATIONS

2021 WINTER BOARD OF REGENTS

ROTATING OFF BOARD

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

Nick Kieffer, IOM, CP
President and CEO
Goshen Chamber of Commerce
Goshen, IN
Term: 2012-2020

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



PROGRAM UPDATES

MARKETING

While it is only the start of 2020, Institute's marketing efforts have been advanced through the hard work and collaboration of volunteers and Institute staff. We appreciate the social media interactions, helping us spread our messaging, and recruiting new attendees for the program each year. Our goal is to create new messaging and outlets for promotion of the organization in addition to sustaining successful practices from past years.

Advertisements:

- *Chamber Executive* magazine has been an important medium for us to advertise Institute testimonials and upcoming registration dates. This publication is now digital and we've been submitting digital ads for their online work.
- Our "scholarship stuffer" postcard was updated with the new 2020 summer sites and 2021 Winter Institute dates, and added to the post-site thank you letters sent to Institute attendees. This card is also included in conference shipments and other meeting materials.
- The Institute planner is our largest and most prominent advertisement. It is distributed to all Institute attendees at site registration and is also included in conference shipments around the country this summer.

Promotional Materials:

- Institute will continue to send blue tablecloths with our logo and hashtag to different conferences, such as W.A.C.E., MAKO, and ACCE where we have an on-site presence.
- The cobalt blue-colored water bottles given to attendees with their planner during Winter Institute registration were well received and are a high-use item onsite.
- Institute screen cleaners continue to be a valuable marketing tool featuring both association and chamber testimonials. They are unique, high-quality items, and printing them in full-color makes them an attractive collateral piece. We are in the process of creating new designs for 2021.

Further Marketing:

- The #TestimonialTuesday social media posts are a weekly post we plan to continue. These give prospective attendees insight into what the program is like and what past attendees have gained from the experience.
- We saw much success with the #ROIInstitute campaign supported by high engagement numbers. This insightful campaign highlighted Institute classes and gave an inside look at what the classroom experience was like. In 2020, we will continue to run the campaign #ROIInstitute, which features attendee testimonials that reflect the usage of Institute-learned skills and what the true ROI for Institute education means.
- We're taking a new approach with Twitter this year and discontinuing all of the tweets that link to articles outside of our website and ecosystem. Twitter should be a platform where people can find important information from our profile and cluttering our feed with links to other professionals doesn't support that.



PROGRAM UPDATES

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

SOCIAL MEDIA

	2019	2020*	Percentage Increase
Facebook	3,050 Likes	3,364 Likes	10%
Twitter	1,878 Followers	1,933 Followers	4%
LinkedIn	-	341 Followers	-
Instagram	509 Followers	593 Followers	17%

**Numbers as of January 24*

On-site Social Media 2020

Winter Institute

256 attendees
Tucson, Arizona
January 5-9



982

Engaged users on Facebook
vs. 815 in 2019



34

#IOMeducates Tweets
vs. 23 in 2019



24

#IOMeducates
Instagram Posts
vs. 17 in 2019



20

New Likes
vs. 21 in 2019



Weekly Total Facebook Reach=

5,498

vs. 5,731 in 2019



PROGRAM UPDATES

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

SCHOLARSHIPS AND FUNDRAISING

FUNDRAISING

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	\$0.00	\$1,000.00	\$4,000.00
Total to Allocate to 2020 Sites:	\$18,948.24	\$7,523.32	\$9,452.29	\$11,411.86	\$5,451.02	\$52,786.73

2021	Winter	Midwest	Southeast	Northeast	Total
Funds Remaining From Previous Year's Scholarship Allocation	\$ 3,500.00	\$ -		\$ -	\$ 3,500.00
Silent Auction and Onsite Fundraising	\$12,585.49	\$ -	\$ -	\$ -	\$12,585.49
#GivingTuesday	\$ 236.31	\$ 726.28	\$ 140.55	\$ 93.80	\$ 1,196.94
Total to Allocate to 2021 Sites:	\$ 16,321.80	\$ 726.28	\$ 140.55	\$ 93.80	\$17,282.43

2021	Winter	Midwest	Southeast	Northeast	Total
INVESTED	\$ 1,215.50	\$ -	\$ -	\$ -	\$ 1,215.50

- Please note that Winter's 2020 fundraising figures are still an estimate. We are waiting for the final auction check, as well as checks for additional onsite fundraising from their annual 5K walk and a scholarship kick back event.



PROGRAM UPDATES

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

SCHOLARSHIPS AND FUNDRAISING

2020 STATE PARTNERSHIP SCHOLARSHIPS

Attendee Organization	SPS Partner Organization	Site
Sauk Valley Area Chamber of Commerce	Illinois Association of Chamber of Commerce Executives (IACCE)	Winter
New Albany Chamber of Commerce	Richland Area Chamber & Economic Development	Winter
Harrison Regional Chamber	Arkansas State Chamber	Winter
Malvern Hot Spring County Chamber	Arkansas State Chamber	Winter
National Poultry & Food Distributors Association	Georgia Society of Association Executives	Southeast
Kansas Soybean Association	Kansas Society of Association Executives	Midwest
Kansas Bankers Association	Kansas Society of Association Executives	Winter
IMPACT Virtual Services	Wisconsin Society of Association Executives	Winter
Executive Director, Inc.	Wisconsin Society of Association Executives	Winter
Shawnee (KS) Chamber of Commerce		Midwest
Franklin Chamber of Commerce	Indiana Chamber Executives Association	Winter
Michigan City Area Chamber	Indiana Chamber Executives Association	TBD
Riverton Chamber of Commerce	Wyoming State Chamber of Commerce	TBD
Goshen County Chamber of Commerce	Wyoming State Chamber of Commerce	TBD
Lander Chamber of Commerce	Wyoming State Chamber of Commerce	Winter
Shawnee (OK) Forward Business Alliance	OK Chamber of Commerce Executives	Winter
Tuttle (OK) Area Chamber of Commerce	OK Chamber of Commerce Executives	Winter
Perry (OK) Chamber of Commerce	OK Chamber of Commerce Executives	Midwest
Executive Director, Inc.		Midwest
Dixon Chamber of Commerce	Illinois Association of Chamber of Commerce Executives (IACCE)	Midwest
Madison County Economic Development Authority	MEDC	TBD
Mississippi Gulf Coast Chamber of Commerce	MEDC	TBD

- Partners have until April 3rd to submit their candidates.
- Rather than offering two SPS Scholarships for Winter, and two for Summer, we now offer four for the entire year to our partnering organizations.
- We now offer a free first year tuition to all of our SPS main points of contacts.



PROGRAM UPDATES

CURRICULUM

Institute Programming Committee

The Institute programming committee has submitted the following three proposals and recommended faculty to ACCE for their annual meeting:

- Chambers as Change Agents – big initiatives for thriving communities: Nika White
- Board Meetings: Leading with Purpose: Bob Harris
- The Meetings Issue: Brad Lacy

The committee will hear back around February 7 with next steps.

Industry Consultations on the App

Starting at 2020 Winter Institute, attendees were able to sign up for Industry Consultations on the app. This saves on paper and allows the IOM team to track the number of consultations and trends on issues. This is also more convenient, as Class Advisors no longer have to pick up additional forms from the staff office when they run out. One area of concern on-site was the confidentiality of consultations, as the forms are not destroyed after conducting the consultation. However, the regent managing Industry Consultations is the only person aside from staff with access to the electronic form responses. There were over 40 industry consultations conducted at 2020 Winter Institute.

Absence Response Manager

As a result of a discussion at the Fall Curriculum Committee Meeting, an additional slot was included in the 2020 Board of Regents Responsibilities Checklist at all sites for an Absence Response Manager to assign make-up work. This takes the responsibility off of IOM staff and allows the regent to make the decision whether or not an attendee is required to submit make-up work. Regents are better equipped to make this decision because they interact with the attendees on a daily basis. The Absence Response Manager at 2020 Winter Institute only needed to assign make-up work to two attendees and received one of the blogs on-site.

Course Audits

The courses audited for 2020 Winter Institute were:

- C185 Recruit, Engage & Retain Members
- E142 Fundamentals of Community and Economic Development
- E150 Diversity, Equity, and Inclusion
- E240 Strong Association for the Future
- E241 Strong Chambers for the Future

Curriculum Changes

E340 501(c)(3) Foundations Management, which was updated and approved last fall, is included as a part of the 2020 summer elective offerings at Southeast and Northeast.

The Curriculum Committee will discuss the E150 Diversity, Equity, and Inclusion changes in an April meeting. IOM staff discussed with ASAE and ACCE contacts about changing E150 to a core class and C130 Unleash the Leader Within to an elective. This will be implemented at 2021 Winter Institute if approved.

BOARD OF REGENTS REPORT



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

WINTER CHAIRMAN'S REPORT, WINTER 2020

2020 Winter Institute was a huge success! We had record registration, record attendance, and above average fundraising. The Board of Regents would first like to thank and commend Raymond, Katelynne, Andrew, Mandy, and Megan. With the absence of Karyn from site this year, the entire team pulled double duty and worked tirelessly to position the Board of Regents, and most importantly the attendees, for success.

Next, I would like to recognize and thank the entire Winter Board of Regents. All 14 members of our board were able to be on-site this year, and the teamwork and comradery made for an enjoyable and effective week. The team was able to handle our situations and divide up the week's workload with maximum effectiveness.

The final attendance numbers for 2020 Winter Institute are as follows:

- First-Year Attendees: 83, with the goal of 82; a 101% success rate
- Overall Enrollment: 254, with the goal of 258; a 98.4% success rate
- Association (& other) Representation: 80, with the goal of 77; a 104% success rate

The initial fundraising numbers for 2020 Winter Institute are as follows:

- On-Site Silent Auction raised \$10,500
- 5K Scholarship Run raised more than \$1,000
- On-Site Donations raised \$3,2000
- Initial Total: \$14,700 with the goal of \$12,500; a 117% success rate

The Winter site, again, experienced a change of venue on the campus of The University of Arizona. The entirety of site (Kickoff, classrooms, break, lunch, etc.) was held in the Memorial Student Union, which actually proved to be a significant improvement in the week. The ability to have all programming in the same building led to numerous improvements during the week, and higher participation by attendees throughout programming.

Our slate of Class Advisors in 2020 were topnotch and each did an above average job of connecting with their respective classes. The idea of having advisors "self-select" into the role again worked exceptionally well. Unfortunately, we lost two advisors prior to site due to family emergencies. I'd like to thank Regent Karri Clark (Bozeman), and Mr. Dexter Freeman (Great Irving-Las Colinas; West site pick up) for filling in as advisors. As a result, it became clear that having experienced advisors serves the first-year classes best, and we will likely be assigning those with previous experience as advisors to first-year classes moving forward.

Finally, I would like to end by thanking staff and the Board of Trustees for the opportunity to Chair the Winter Board of Regents. As I have stated before, the Winter team is a family and passionately dedicated to Institute. Again, they have proved they are the best of the best and I am truly honored to have served them as Chair.

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

BOARD OF REGENTS REPORT



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

MIDWEST CHAIRMAN'S REPORT, WINTER 2020

The Midwest Board of Regents is energized and looking forward to the 2020 site in Madison. This Board of Regents is a very nice combination of different perspectives, which ultimately makes for great programmatic decisions. We have also been privileged to add a few Board of Regents from West, which serves to further increase our energy. Our priorities include recruitment and retention, fundraising, and improving the customer experience.

The 2020 official attendance goals, 146 overall with 44 first-years, are challenging, yet attainable. In 2019, this team surpassed attendance goals and we expect to maintain the momentum. We believe we have a good playbook in order to reach the goals and we just need to maintain a sharp focus. Our action items include:

- Increase visibility and relationships with our respective state chambers and associations. Personal phone calls along with in-person discussions at events are extremely valuable.
- Maintain contact with our prospect lists. These interactions maintain relationships and relevancy, as well as lead to more prospects.
- Make at least five personal asks from each board member's state.
- Share the positive IOM aspects and energy on our social media as much as possible.

The elimination of the West site grabbed all our attention to say the very least. It serves as a profound reminder that Institute, like all of our chambers and associations, must run as a business and tough decisions are made. Certainly, ongoing fundraising for our programming must remain a priority. This effort not only balances the budget, but it creates "friend-raising" opportunities. Here again, the more prospects and attendees feel the positive energy from the Board of Regents, the more attracted they will be to our phenomenal programming. Our goal for 2020 is to raise \$8,500 for the year, with special attention paid to Giving Tuesday and on-site efforts.

Finally, as a board we were disappointed in our customer service ratings via attendee surveys. We had the usual conversations around the reality that it is always a challenge to connect with the vast array of personalities, experiences, and overall diversity of our attendees. We are going to find a way to build more fellowship into the Sunday night welcome.

It is universally agreed upon that our Class Advisors serve as the #1 point of contact and can make or break the students' experience. The culture of our site is strong, and Jenna Armstrong has worked diligently to fill our Class Advisor roles. All five Class Advisors and Regent Partners have been confirmed.

It is with great confidence I report that the 2020 Midwest Board of Regents is on target.

Submitted by: Jeff Griffin, IOM
Chair, Midwest Board of Regents

BOARD OF REGENTS REPORT



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

SOUTHEAST CHAIRMAN'S REPORT, WINTER 2020

The Southeast Board of Regents is excited to promote and prepare for Southeast Institute in Athens. Our goals are 256 overall attendees and 81 first-year attendees.

As highlighted annually, one of the biggest challenges continues to be attendee diversification at the Southeast site. The Southeast location is populated with mostly chambers of commerce within a 500-mile radius, thus trade associations are very small in numbers at our location. We will continue to engage with several national and state associations to encourage their membership to attend Southeast.

We will focus on these three initiatives for Southeast Institute in 2020:

- 1 – On-Site Fundraising - We have charged our Board of Regents to think outside of the box to come up with unique auction items for our silent auction and are considering a live auction of just 3-5 items at the Big Bash.
- 2 – Ambassador Program - We will continue the new ambassador program we started in 2019, which worked great in welcoming new class members and helping showcase Athens, Georgia and places to see, eat, shop, etc. while there.
- 3 – Social Media – We will encourage board members to share their Institute experience on social media and how it has made a difference in their personal lives and careers. We are also reaching out to our state associations to add Institute posts to their social media pages and e-newsletters. Additionally, we will ask for speaking time at state conferences to share information on Institute.

We believe Southeast is successful because we are warm, friendly, and personal, and we model Southern Hospitality! I am very grateful and honored to serve the U.S. Chamber Foundation, the Southeast Board of Regents, and the staff as Chair this year and look forward to a great 2020 Southeast Institute!

Submitted by: Teri H. Smiley, IOM, GCCE
Chair, Southeast Board of Regents

BOARD OF REGENTS REPORT



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

WEST CHAIRMAN'S REPORT, WINTER 2020

On behalf of the West Board of Regents, I am pleased to provide a transition report in place of the typical update. Before I give the report, I would like to say thank you to those on this call, and others, who reached out to me personally offering support or to other board members to offer a place for them to continue volunteering. I want you to know how impressed I was with the comradery of this board and how much your contacts were appreciated.

With the closing of the West site, the West Board of Regents has been working with Institute staff on transitioning attendees to new sites and board members into new roles. In regards to West attendees, as you are aware, each was sent a letter explaining the closure and contained information on attending other Institute sites. In particular, we focused a lot of attention on the incoming, fourth-year attendees in a couple of different ways:

- We wanted to offer fourth-years the opportunity to still graduate as their own, stand-alone class. Institute staff agreed that West could have their own class if we had a minimum of 13 agree to the same location. At this time, we have had 13 commit to Midwest, and therefore, there will be a 4-2 Midwest graduating class comprised of West attendees.
- In regards to attendees, 17 attended Winter this past January. We will continue to monitor West students who enroll at other sites this summer.

We also felt strongly that we should find new roles for our board so that they could continue their involvement with the Institute program. In meeting with Raymond for our West Board of Regents meeting last October, we expressed a deep interest in trying to still work together in some way, but realized we could not all transfer to an existing site board. Raymond engaged us in a discussion about starting an Institute Programming Committee that will work on giving Institute more of a presence at ACCE's Annual Meeting, in addition to other conferences. Eight members of our board agreed to participate on this new committee, and worked to propose three sessions for the ACCE Conference in Dallas. These sessions will serve to highlight the types of classes and elevated curriculum offered at Institute. Our committee also suggested Institute faculty to lead these presentations, will help by volunteering during the sessions, and committee members will give their time helping to staff the Institute booth at ACCE. We see this as an incredible opportunity to market the Institute program to chamber executives in a new, peer to peer manner.

Finally, I'm pleased to report that one West Board of Regent member has joined the Midwest board, one has joined the Winter board, and two are considering joining the Northeast board. Our vice chair of West, Lisa Hermes, will serve as the Class advisor to the West fourth-year class at Midwest, another of our team will serve as the Midwest fourth-year Regent Partner, and two will travel on-site to Midwest to assist during the week.

Despite the challenge that this was for us, I think that we have had a successful transition after West was closed. I look forward to working with you all in different ways and, again, thank you for all of the support you have shown us.

Submitted by: Ryan Evans, IOM
Chair, West Board of Regents

BOARD OF REGENTS REPORT



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

NORTHEAST CHAIRMAN'S REPORT, WINTER 2020

The Northeast Board of Regents has a goal of 139 overall attendees, 44 of which are first-years.

The Northeast Board has embarked on an email communication plan focusing on each of the board respective states. We have developed five strategic messages with clear call to action statements. The first message "Remember to Budget for Institute" was sent in early November followed by the next message "Make Institute Your Resolution" was sent out the first week in January. The remaining three messages "Apply for an Institute Scholarship" to be sent in March; "Save with Institute Early Enrolment" will go out in April and "Rise to your next level at Institute" will go out in early June for one last push for enrollment. In addition to the graphic each member of the board is also including a personal message to each prospect with links to the Institute online resources.

The Ambassador program will be expanded to welcome and assist new attendees utilizing third- and fourth-year returning students. This not only helps with identifying future IOM leaders, but it also helps with retention.

The on-site strategic focus will be on maintaining a high level of hospitality to include cohesiveness amongst the classes by hosting an off-site Sunday evening event and a reception prior to the big bash. We are also excited to introduce the new dorms that are walking distance to the classes and dining hall eliminating the need for multiple motor coach stops in the morning and evenings.

In past years, our board had an active social media presence during the IOM week that encouraged both attendees and regents to post about specific classes. We are going to continue that week of social media moving forward. This will be our third year organizing state photos where they are to posted Institute social media accounts and attendees are encouraged to share them as well.

Submitted by: Douglas OFlaherty, IOM
Chair, Northeast Board of Regents



DEMOGRAPHICS

2020 WINTER INSTITUTE

2020 Winter Institute

254 Attendees from 41 states and the District of Columbia

State, Number of Attendees, %

Alabama	2,	0.79%	Minnesota	7,	2.76%
Alaska	6,	2.36%	Missouri	7,	2.76%
Arizona	13,	5.12%	Montana	4,	1.57%
Arkansas	10,	3.94%	Nebraska	7,	2.76%
California	11,	4.33%	Nevada	1,	0.39%
Colorado	7,	2.76%	New Hampshire	1,	0.39%
Connecticut	1,	0.39%	New Mexico	3,	1.18%
District of Columbia	19,	7.48%	North Carolina	5,	1.97%
Florida	4,	1.57%	Ohio	6,	2.36%
Georgia	2,	0.79%	Oklahoma	12,	4.72%
Idaho	4,	1.57%	Oregon	3,	1.18%
Illinois	10,	3.94%	Pennsylvania	3,	1.18%
Indiana	5,	1.97%	South Carolina	4,	1.57%
Iowa	8,	3.15%	Tennessee	2,	0.79%
Kansas	5,	1.97%	Texas	32,	12.60%
Kentucky	3,	1.18%	Utah	2,	0.79%
Louisiana	2,	0.79%	Vermont	2,	0.79%
Maine	2,	0.79%	Virginia	10,	3.94%
Maryland	3,	1.18%	Washington	4,	1.57%
Massachusetts	1,	0.39%	Wisconsin	3,	1.18%
Michigan	19,	3.94%	Wyoming	8,	3.15%

Top Increase Since 2019:

Oklahoma +5

Most Attendees in 2019, Texas with 28

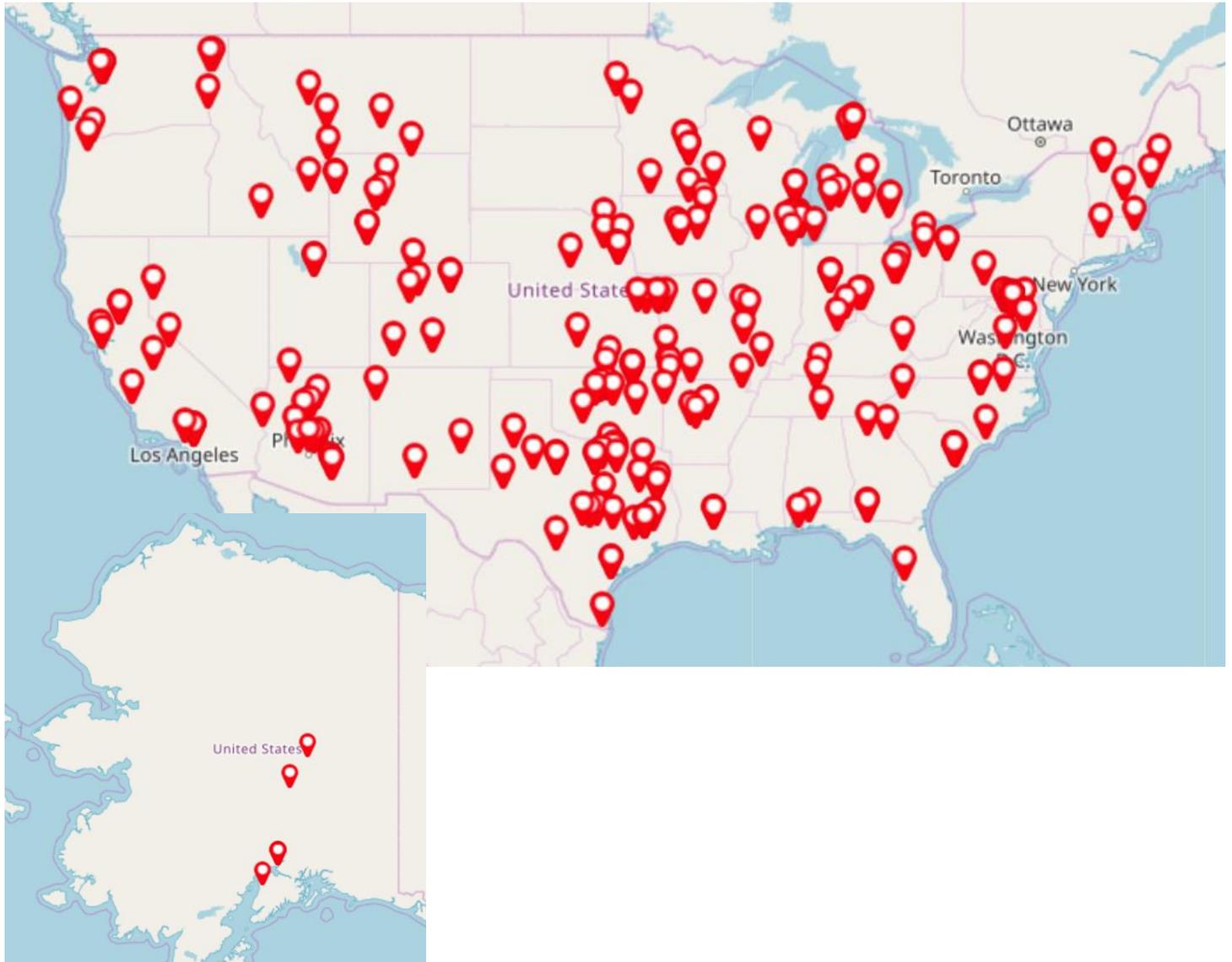
Most Attendees in 2020, Texas with 32



DEMOGRAPHICS

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

2020 WINTER INSTITUTE





DEMOGRAPHICS

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DEMOGRAPHICS BY SITE

Class Level	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2020
1st year	29.45%	29.41%	32.69%	30.77%	32.68%
2nd year	22.60%	29.41%	22.12%	30.77%	22.83%
3rd year	26.03%	22.27%	19.23%	18.46%	23.23%
4th year	21.92%	18.91%	25.96%	20.00%	21.26%

Employer	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2020
Association	24.66%	8.82%	17.31%	43.85%	25.20%
Chamber	64.38%	88.24%	72.12%	44.62%	68.50%
Other	10.96%	2.94%	10.58%	11.54%	6.30%

Age	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2020
21 – 30	10.96%	18.07%	20.19%	16.92%	12.99%
31 – 40	40.41%	31.51%	24.04%	33.08%	31.89%
41 – 50	32.19%	31.09%	35.58%	25.38%	29.92%
51 +	16.44%	19.33%	20.19%	24.62%	25.20%

Ethnicity*	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2020
*Question not required (answers may not total 100%)					
Caucasian	86.30%	83.61%	67.31%	75.38%	81.89%
Other Ethnicity	6.16%	10.50%	19.23%	10.00%	9.45%

Years of Experience in Association/Chamber Field	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2020
Less than 2 years	6.85%	9.66%	9.62%	9.23%	9.84%
2 to 5 years	31.51%	34.87%	35.58%	26.15%	28.35%
6 to 10 years	25.34%	28.15%	21.15%	18.46%	29.92%
More than 10 years	36.30%	27.31%	33.65%	46.15%	31.89%

How Did You Learn About Institute?*	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2020
*Multiple Responses Possible					
Employer	47.26%	64.29%	63.46%	48.46%	48.82%
Colleague	38.36%	19.75%	24.04%	37.69%	33.46%
State Conference	6.85%	7.98%	1.92%	4.62%	6.69%
Direct Mail	0.00%	0.00%	0.00%	0.00%	0.00%
Email	1.37%	2.52%	3.85%	3.85%	1.57%
Website	0.00%	0.00%	0.00%	0.00%	1.18%
Other	6.16%	5.46%	6.73%	5.38%	8.27%



DEMOGRAPHICS

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

DEMOGRAPHICS BY SITE

Organization's Budget Size <i>(excluding Public Funds)</i>	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2020
Less than \$100,000	3.42%	4.20%	1.92%	0.77%	5.51%
\$100,001 - \$250,000	12.33%	14.71%	5.77%	6.15%	11.81%
\$250,001 - \$500,000	22.60%	21.85%	16.35%	10.77%	18.90%
\$500,001 - \$1,000,000	16.44%	21.85%	14.42%	20.77%	17.72%
\$1,000,001 - \$3,000,000	16.44%	18.07%	30.77%	23.08%	20.87%
\$3,000,001 - \$5,000,000	6.85%	7.56%	6.73%	12.31%	9.06%
\$5,000,001 - \$10,000,000	9.59%	7.14%	10.58%	9.23%	5.51%
Greater than \$10,000,001	12.33%	4.62%	13.46%	16.92%	10.63%

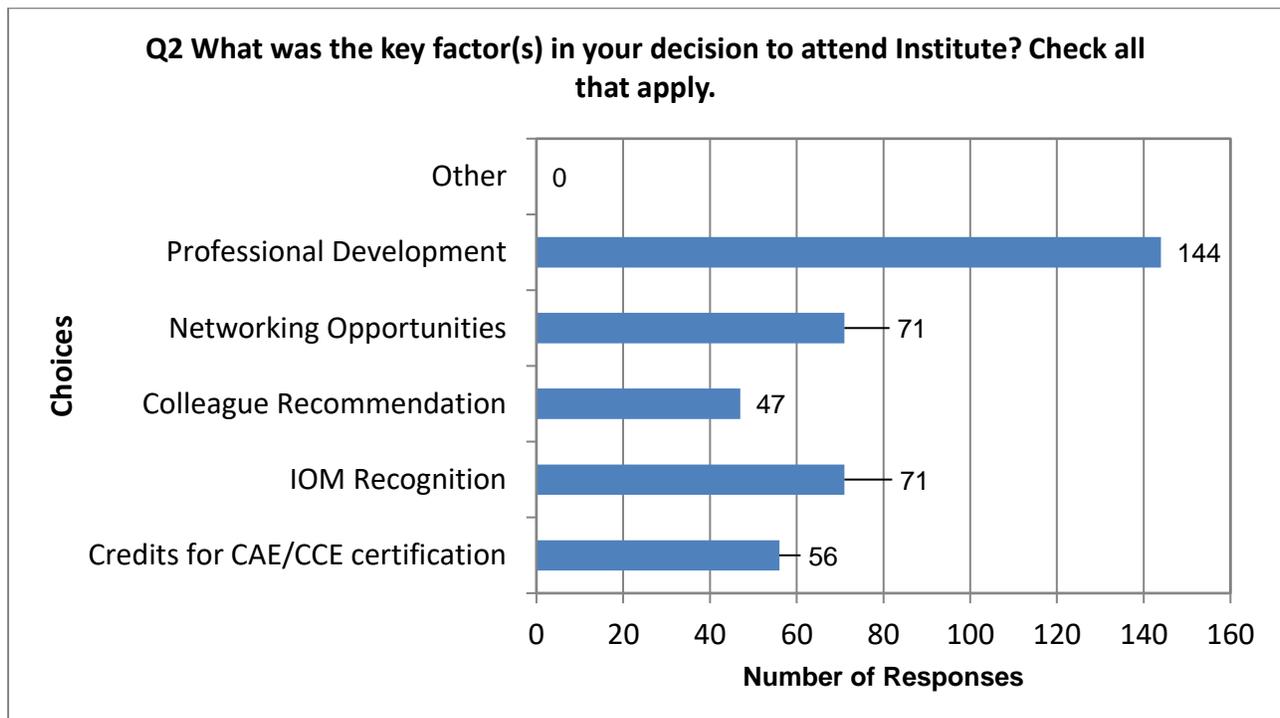
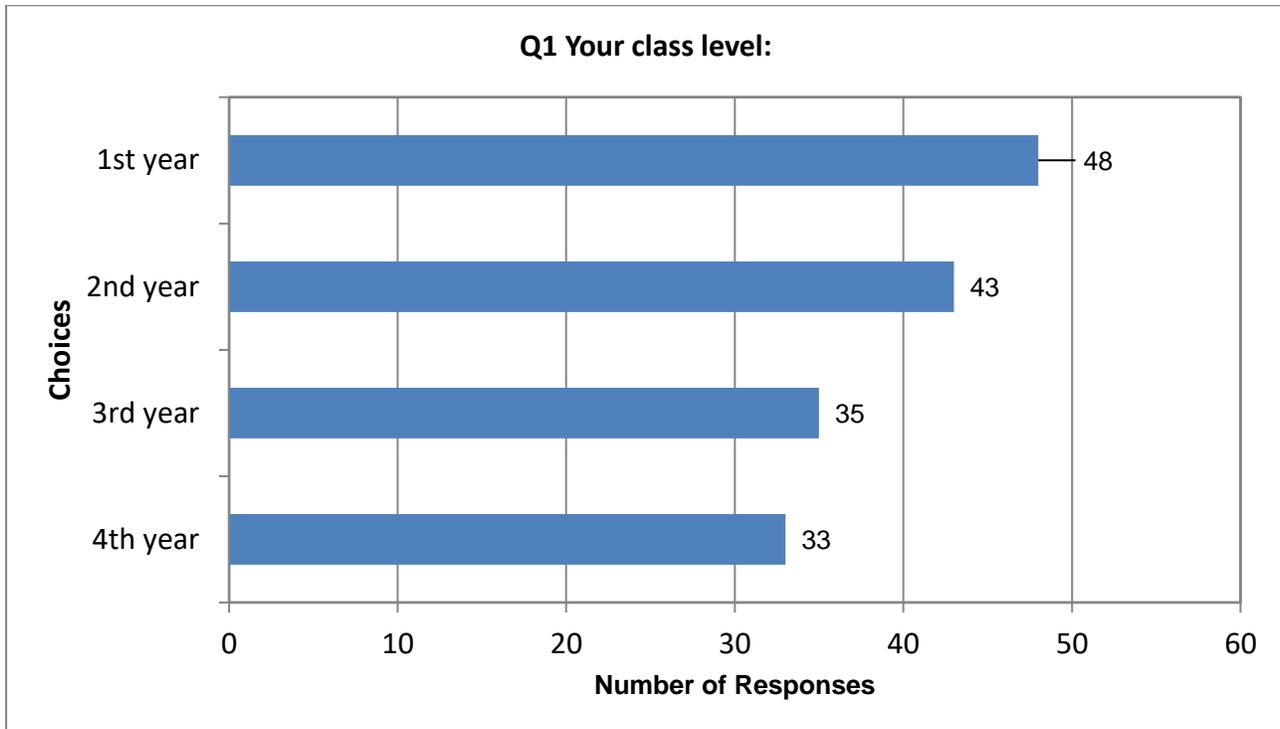
Organization's Staff Size	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2020
Less than 3	19.86%	18.91%	11.54%	8.46%	19.29%
3 to 10	43.84%	52.10%	47.12%	44.62%	47.64%
11 to 25	11.64%	13.45%	16.35%	20.77%	14.17%
26 to 50	9.59%	11.76%	13.46%	7.69%	7.87%
51 to 100	8.22%	1.68%	5.77%	9.23%	4.33%
More than 100	6.85%	2.10%	5.77%	9.23%	6.69%

Level of Responsibility	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2020
CEO / Executive Director	36.30%	34.03%	25.96%	21.54%	37.01%
Senior Executive / Department Director	34.93%	35.29%	42.31%	43.08%	35.43%
Manager	19.86%	17.65%	19.23%	25.38%	16.54%
Coordinator / Assistant / Other	8.90%	13.03%	12.50%	10.00%	11.02%

Primary Job Responsibility	Midwest 2019	Southeast 2019	West 2019	Northeast 2019	Winter 2020
Membership	17.12%	20.59%	16.35%	16.15%	16.54%
General Management	47.26%	39.92%	34.62%	34.62%	45.28%
Marketing	13.70%	11.76%	34.62%	11.54%	10.24%
Finance	1.37%	4.62%	7.69%	5.38%	3.94%
Government Relations	4.11%	4.20%	7.69%	10.77%	7.87%
Other	16.44%	18.91%	22.12%	21.54%	16.14%

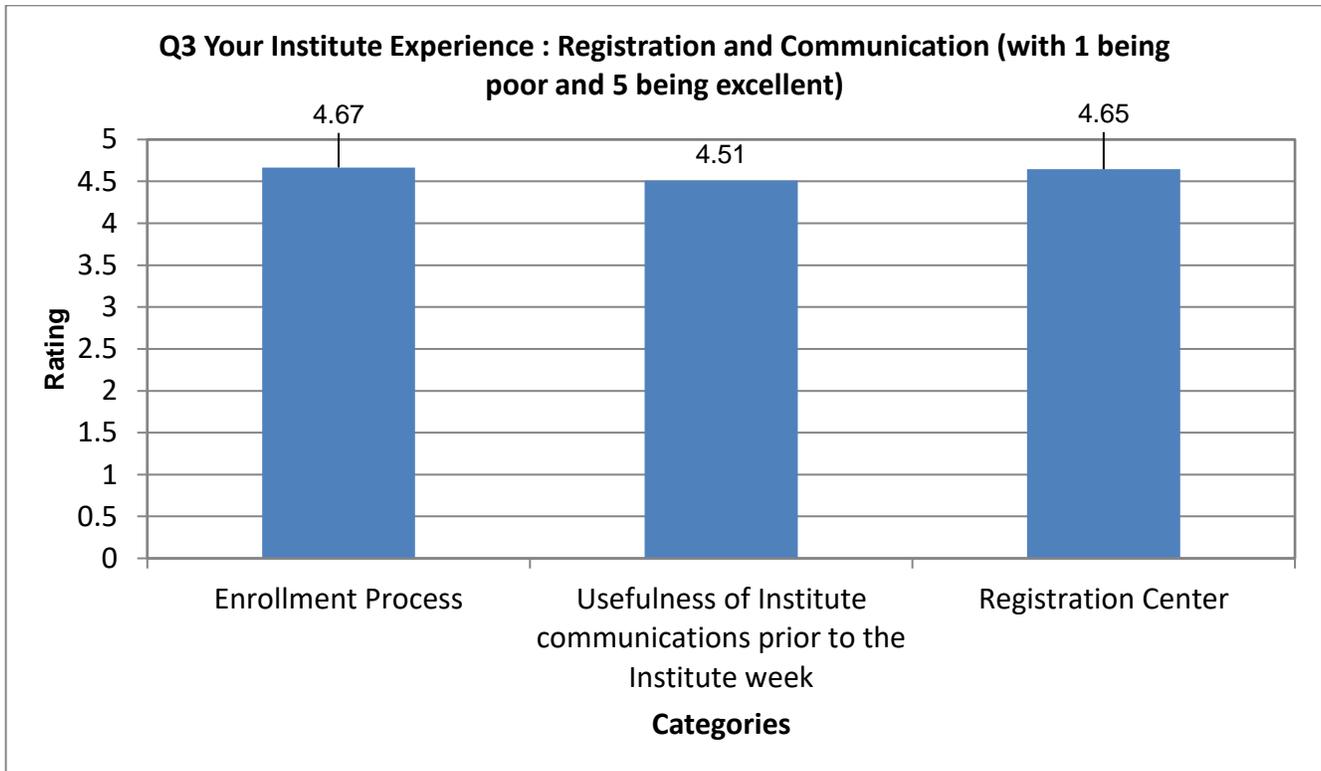


ATTENDEE SURVEY RESULTS AND FEEDBACK





ATTENDEE SURVEY RESULTS AND FEEDBACK



Q4: Additional comments about registration and communication*:

- It is very difficult to focus on emails that come in before the end of the year, which is a very busy time with many other emails. Perhaps just one email with the app info, etc. the week prior would suffice. I also noticed that many attendees did not have pre-class assignments done as that was also requested in an email. My suggestion would be to not have any pre-class assignments at all.
- Well run and very organized.
- The only recommendation I would have is to make it a little easier to obtain the discount for those organizations registering more than one person.
- The registration process is a bit clunky, and it would be helpful for non-first year's to have access to a list of previously enrolled electives.
- Too many emails!
- Very friendly, and inviting registration process & Staff.
- One suggestion leading up to institute - I was getting LOTS of emails the week before and of Christmas and NYE. I missed most of them and never read them, or got the homework assignments in advance. I'm not sure if there is a way to communicate thru the app? That way once we reach make our way thru the holidays and are ready to engage, we can log on and see all of our messages from the board and instructors? Just an idea that would help streamline communications.



WINTER

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- For some reason, I did not receive all the communications going out both from Institute directly and from the instructors. I looked in my spam/trash and didn't see them in there either.
- I wonder if it would be possible to send the app sooner and use it more for communication. My only reason is how easy it is to overlook emails in our industries if they are time-sensitive. When we are on-site and we get the text alerts as well it is helpful, so curious if that could be carried over to information from IOM as well as our advisors the weeks leading up to classes.
- I was a late registrant, so received very little communication ahead of class. My fault!
- We had a flurry of emails occurring over the weeks prior to Institute. While I thought the reason for those emails was certainly relevant, it would have been nice to have many of those emails organized into one larger email. For example, we had lots of emails from different teachers. Perhaps, coordination with Institute staff to compile all of those assignments into one location and on one email would be simpler. I notice many attendees didn't complete the easy assignments and I would suspect that was partly the reason.
- I wish I was able to more easily see the previous electives I had taken and who would be teaching the electives.
- There were a LOT of communications, and it made it hard to go back and find the one piece of information I was looking for. I missed registration, because I didn't know it was at the hotel.
- Communication prior to the event was way too much. Many emails were 'friendly' emails, introducing fellow classmates, so much so, that I began deleting or filing before reading and then ran into the risk of NOT reading important, meaningful communiques. I suggest that important information, conveying critical facts be sent to our emails and fun, fluffy emails be sent via the notification tool inside the IOM app.
- The registration and open communication prior to check in for Winter Institute was seamless and welcoming. Well Done.
- Being able to have a glance with descriptions of all the electives at once would be nice. That way you can more easily compare which electives you want and if they are offered more than once. I signed up for an association class not realizing there was once with the same name but for chambers.
- The registration software was a little confusing to use.
- I understand that communication leading up to Institute is important but I do find it difficult to 'pay attention' to some of them and I think it's really the timing of our class being right after the holidays. The emails are rolling in right before the holidays when I am trying to get things done in the office to be able to enjoy a little time with my family so It does feel like an added stressor especially when you have a speaker that is giving you 'homework' in advance.
- I think that IOM needs to figure out a different way to communicate to their classes besides email with reply all. We are all busy professionals - including the advisors, and having reply all is messy and leads to missed communications. There has to be a way to communicate more efficiently through the app or something. I understand having a few emails initially - like "download the app" and other things, but the ones where we all introduce ourselves through reply all is ridiculous.



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ATTENDEE SURVEY RESULTS AND FEEDBACK

- I never heard back from anyone about my scholarship request, so that is the only disappointment I had in communication. Even a short, "we're sorry" would've been nice to know for planning purposes. Other than that, everything went very smoothly.
- It would be great to have a system that does not allow you to take any classes twice
- Did not like the emails encouraging you to reply all to introduce yourself to everyone - that's a lot of emails in your inbox right before the holidays!
- I would say if they can limit the number of emails sent by class advisors or class reps, that would be great. I realize we had a transition between class advisors, but we received a dozen emails or more about various things to prepare for. I do appreciate the preparation, but it was hard to keep up or stay on top of them.
- It would be helpful if the classes that I had already taken were somehow denoted so that I didn't accidentally enroll in something I'd already taken.
- There were a TON of emails coming from a lot of different directions. I would maybe suggest creating Dropbox folders or something similar for a lot of the files/communication, just so it will all be in one place.
- I think the Sunday reg and homeroom should be moved to Monday. For folks like me traveling from the Midwest, this required me coming in on Saturday. I would have preferred to spend the weekend at home and fly out Sunday night. It would behoove you to think of the participants who are not from the west.
- Because I was a West transfer had to research some items but overall process was good. There was a letter sent about scholarship opportunities for West transfers and when I called the US Chamber they said scholarships were not available.
- I thought it was very convenient to have registration at the hotel. With traveling and being in airports all day it was nice to just have to walk to the lobby! Very thoughtful!!
- It works great! fast, efficient and easy! Great job! PLEASE no more dungeon classes!! I will say I really enjoyed having the classes at the hotel last year. It just seemed more hospitable.
- The instructions were clear and well thought out. The instructors and staff were helpful and friendly. Everything about the week was made as easy as possible for us. I really appreciate the time and effort that took.
- I was aware because I work with the institute staff, but some of the other 1st years didn't really know about the big bash/thought it was just something for the graduating 4th years. Maybe having a little mention of how people tend to dress nicer for that... but other than that everything was great! Thank you for putting on an amazing week!
- Overall very good.
- It would be nice to be able to tell what electives I've taken during the registration process.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- There were some events that I wasn't aware of prior to my arrival such as the KickOff Dinner after homeroom, the association mixer and IOM has talent. I had planned on using that time in other ways but I went to IOM with the primary goal of being engaged, getting connected, and fully participating. I'm glad I did those other events but it caused me to juggle. I'm a fairly flexible person, but I heard another person say they struggled with making last minute commitments or being persuaded to do something they hadn't prepared for so attendance at some events may have been lower for first year people that didn't quite know that most of our time at IOM is planned with events.



Q6: Additional comments about customer service*:

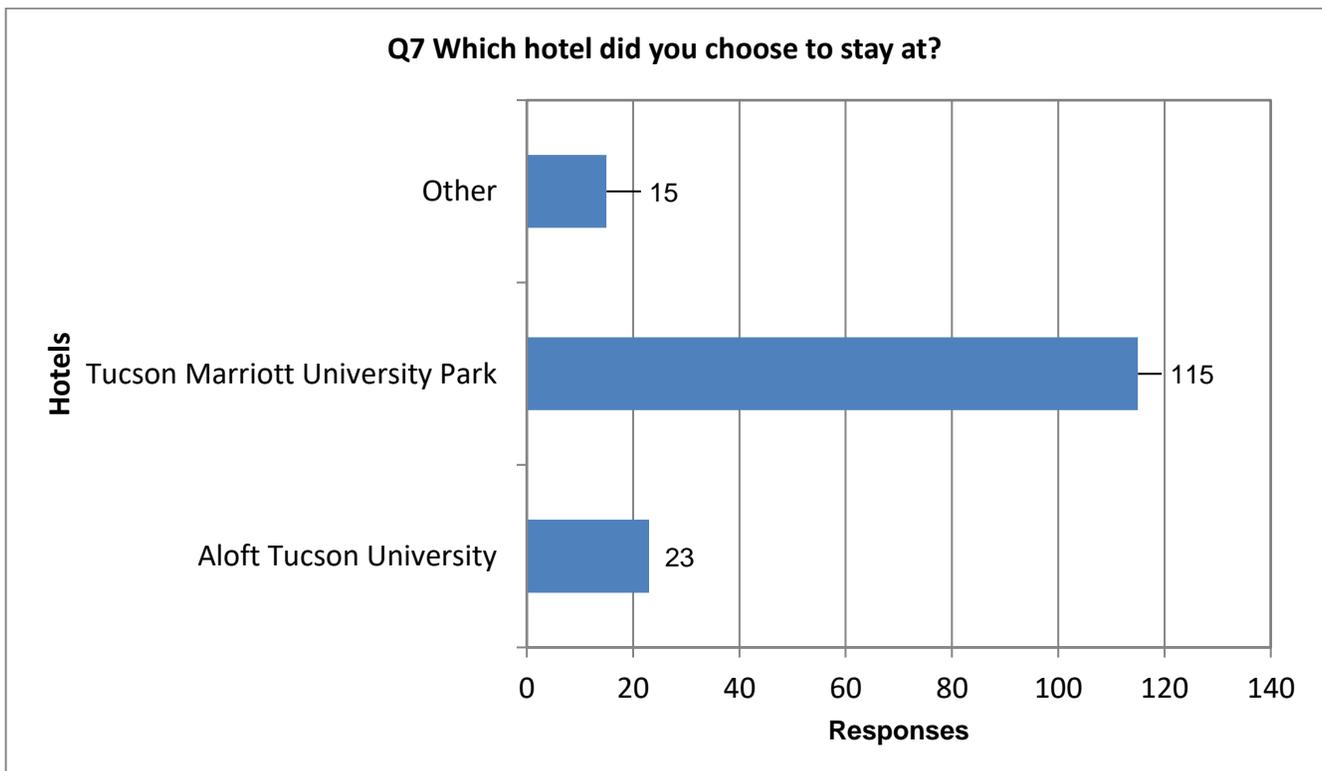
- Hotel staff does an amazing job, especially under the challenging circumstances of the seemingly never-ending renovation project. They could not have been nicer.
- The Board of Regents overall has been wonderful to deal with. This year's leadership was unnecessarily challenging at times.
- Class advisors and Board of Regents were very personable and approachable.
- All staff, advisors and regents were very welcoming and always made sure to address you when passing in a hallway.
- [Removed] was a great class advisor! All of the institute staff and board of regents were helpful and cheerful. I'm so glad to be a part of Institute!



WINTER

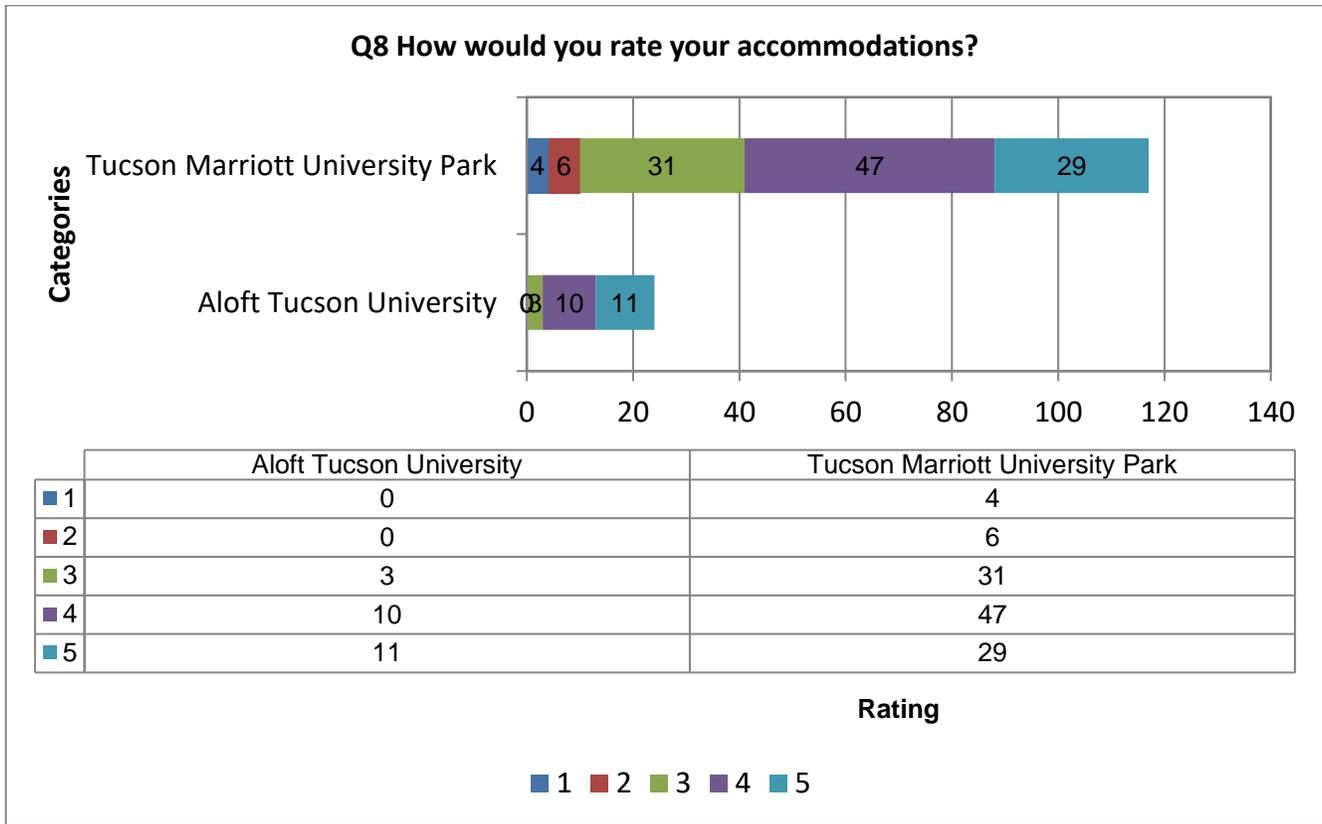
ATTENDEE SURVEY RESULTS AND FEEDBACK

- Class [removed] really enjoyed [removed] as an advisor and if possible would appreciate having him once more.
- Insitute Staff, Class Advisors and Board of Regents were all absolutely amazing!! The hotel staff was friendly but not over the top bursting with customer service, it did seem like the CS was better last year. I had great service from the little lady that checked me in and she also checked me out. The concierge was very helpful and friendly as well.
- [Removed] was an excellent class adviser.
- Everyone was attentive and professional, but friendly and personable. Advisors were eager to help and offered assistance at every opportunity. Hotel staff was very accommodating and went out of their way to be cheerful and pleasant.
- The class advisors and regents were very helpful, especially as a first year. They were upbeat and willing to answer any questions that came up.
- Tucson definitely was a wonderful experience. The Community and regents were very welcoming and helpful!
- I encourage the institute staff and board of regents to be more social and connected to the attendees. It's one thing to remind people to get to class but we are all senior level folks in our organization and that should be secondary to partnership and relationships.
- I was in [removed] and our class adviser was amazing!
- Our class advisor was [removed] and she was AMAZING!!!





ATTENDEE SURVEY RESULTS AND FEEDBACK



Q9: Additional comments about accommodations*:

- The staff at the Marriott was amazing! Very friendly and professional.
- Great location. Nothing you all can do about it, but I woke up to trucks every morning starting at 4am for the construction next door.
- Rooms were great and the upgrade is fantastic! The construction was a bit of a headache. They would start outside at 5 am and it was impossible to sleep. But that's a temporary issue. It will be great next year!
- As a 4th year attendee it was sad to see the hotel still under construction after the last 3 years being so.
- Tired of paying to stay in a construction zone.
- I know some people were put off by the construction. My room was situated in a way where I was not bothered at all by the sounds. The staff was very friendly and accommodating.
- Wish the lobby had been finished like they promised in 2019.
- Construction noise in the early mornings was a little much but I understand that some of that is not controllable by the hotel management.



WINTER

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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Every year they have a problem getting one room for the entire stay but then when you ask if the 2nd room booked is available for the whole time, it seems to work out. Terrible renovation inside and outside adjacent beginning at 5:00 am.
- Hotel was a hot mess.
- The room blocks sold out really quickly, which is why I ended up in an AirBnB.
- Funny how it's always under construction. I really enjoyed having classes offsite. I think it'd prefer breakfast provided and lunch open/free time.
- They did a nice job of greeting us with goodies late afternoon in attempt to alleviate the construction.
- Can't wait to see the hotel finished next year!
- Wish they weren't always in construction.
- The hotel is should have closed down for renovations. Unbelievable that this is not done yet, I am going to try to stay somewhere else next year.
- Construction in and out. Outside construction noise began as early as 4:30 am.
- The hotel staff and bar were excellent. Overall the hotel felt a bit used and in need of upgrades to carpet, tiles, and some ceiling areas. I came back on one evening to find a man wondering the halls, checking doors, and ultimately found he had defecated on the floor in front of the door to my room. I called the Front Desk and they resolved the matter quickly.
- I think it would have been nice to have a heads up about the hotel renovations. That we know what to expect upon arrival. However, I did appreciate and enjoyed the renovated room. I'm sure next year it will be worth all the headaches from this year. The wait staff and bartenders were not overly friendly the night of the Big Bash.
- I was very disappointed with the construction that we have been dealing with for 3 years. I filled out their survey and felt like they could have made some discounts or something to make our stay a little more enjoyable.
- It was so quiet at night and I really appreciated that. Even with the construction going on, the noise was kept to a minimum and there were no obstacles that were overwhelming or detrimental. There were no trip and fall hazards noted.
- I loved the location of the hotel but all the construction made it a real mess. Hopefully, they will have the construction completed soon.
- Hotel remodel for the rooms was better. I am not sure that it will ever not be in construction...
- Construction noise was off-putting but overall the accommodations were fine.
- The only problem I had with my stay was the showers were cold due to remodeling is the reason I was given.
- The lighting in the room & bathroom isn't conducive for getting ready in the morning.
- When will construction be over?
- The construction seemed to bother quite a few people I spoke with who were staying at the Marriott, but that's temporary. It is what it is.
- No one informed us of the ongoing construction in and around the hotel. I rarely got more than 4 hours of uninterrupted sleep all week.



WINTER

U.S. CHAMBER OF COMMERCE FOUNDATION
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ATTENDEE SURVEY RESULTS AND FEEDBACK

- Room was comfortable, but the floor being vinyl was dirty and not mopped - had stains on it. Shower leaked and we had to call maintenance to have it caulked. Our room was on the south side of the building, so that was nice, but it had an adjoining door to the next room. Because of this and the vinyl floor, sound from the adjoining room was very bothersome. It would have helped if we could have turned the fan on for the vent system, but it only came on when it called for cooling or heat. Auto on for a fan is big for a hotel to drown out outside noise. Location to the campus was very nice. Many joked about the ongoing construction in the hotel, but that was not very disruptive so not that big of bother.
- While the hotel was beautiful and I did not have any issues with the customer service there, I wish we had been informed of the construction prior to attending. While the construction in the hotel did stop in the evenings, which was very appreciated, the construction on the building next door occurred at all hours of the night. My room was right next door to the building and I was woken up at all hours due to the noise.
- I'm sure you've heard it a million times...construction! Not only from the Marriott's renovation itself but from the neighboring building (starting at 6:00 am). Also, the room renos were nice but needed to be dialed in significantly (outlets and lamps not working, poor lighting) Great location though...I wouldn't change it!
- Hotel initially assigned me an occupied room. Which was super awkward. Other than that all was good.
- Great room, staff and location; just a bummer with the construction blocking the lobby area and not having a central 'gathering' place
- Rooms were great. Lobby was completely under construction.
- My room faced the new building construction, last night there seemed there was a generator running all night. Hotel open lobby concept creates echo chamber of noise from late night out and about guests.
- Proximity to campus was great. Construction was a noise issue and not the best for sleeping.
- I stayed at the Hilton Doubletree last year too. It is a nice property, I had a large room, a great health center and a nice restaurant on site. They also have a shuttle that brought me back and forth to the student union each day for free. I had to work at night -- so I needed something away from the nightlife so I would not be tempted. They have a heated pool, an amazing complimentary breakfast for Hilton Rewards members and a large hot tub. I heard from a Lyft driver that maybe the surrounding area wasn't super safe at night for a woman to be walking around alone, but that was not part of my plans.
- Room was nice, but the construction was loud going on inside the hotel.
- It's unfortunate that the hotel has been under construction for 3 of our 4 years of Institute. I have to wonder if there may have been any other options, especially with last year's classes also being at the hotel.
- The Marriott renovations underway were not ideal, but the work-around was fine.
- At some point, they need to finish the renovation! It's been three years. They lost a lot of revenue without a full service restaurant and bar (too small).



WINTER

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Understand they were renovating, would have been nice to give us a bit more of a discount since we didn't get the full hotel experience.
- The construction noise started earlier than indicated in the notices. It would've been nice to have construction start no earlier than 7am.
- construction made it crazy, staff was nice, but inconsistent with service
- I heard a lot of people were not able to find/get rooms so I recommend going a larger block next year. I would look at the percentage of increase in registration over the last two years and use that as a gauge on how many to increase by. I also recommend that when you RFP next year see if you can get some accommodations for parking (for those of us who drive/carpool). If not free, a discount would be great. In past years aloft was free but it was \$6/day and next year they said it will be \$10/day. Never stayed at the Marriott but I know the parking fee on top of the higher rate was one of the reasons I didn't stay there.
- The renovated rooms were nice. It would be nice if they can finish the hotel before next January.
- I don't have much to complain about my stay. Everyone was super nice and helpful. I will say I was not a fan of the food for the dinner at the big bash.
- As mentioned earlier... I just can't wait for the construction to be done. I honestly can't understand why it's taking them THREE years to update the place!? Anyway, the staff is always nice and the breakfast was good, a little pricey, but good. I really liked the welcome back after class with refreshments and sweet treats!
- I was on the Speedway side of the building. Will know to request opposite side next year in order to avoid as much street traffic noise. (Or, hope the Marriott is under less construction next year and stay there instead.)
- One evening, there was no hot water in the shower. The heat did not work properly. My room wasn't ready until homeroom time on Sunday, so didn't get checked in until about 10pm that evening. Room wasn't entirely finished from remodel. The lobby was the pits. Big Bash was a crazy experience. Food service was really poor, timing was way off - no idea the back story.
- Other than the slow elevators, it was great. Very Clean, nice views, close to class, walking distance to all shopping and dining.
- Would like to attend one Institute without having to deal with construction at the various locations.
- The valet was not easy to use- even when we called ahead to have the car ready, it was not. Water was often cold and wouldn't get hot.
- I'm sure I won't be the first attendee to complain about the hotel construction for the third year in a row. The hotel staff was generally friendly but unfortunately that is the only kind thing I can add about the Tucson Marriott. Not once was my room cleaned. Fresh linens were never brought, the floor was dirty upon my arrival and stayed that way for the duration. The only thing the house keeping did was make my bed, poorly. For a Marriott, I was highly disappointed. It was dirty, loud and an absolute mess.
- Only lower because of the construction.

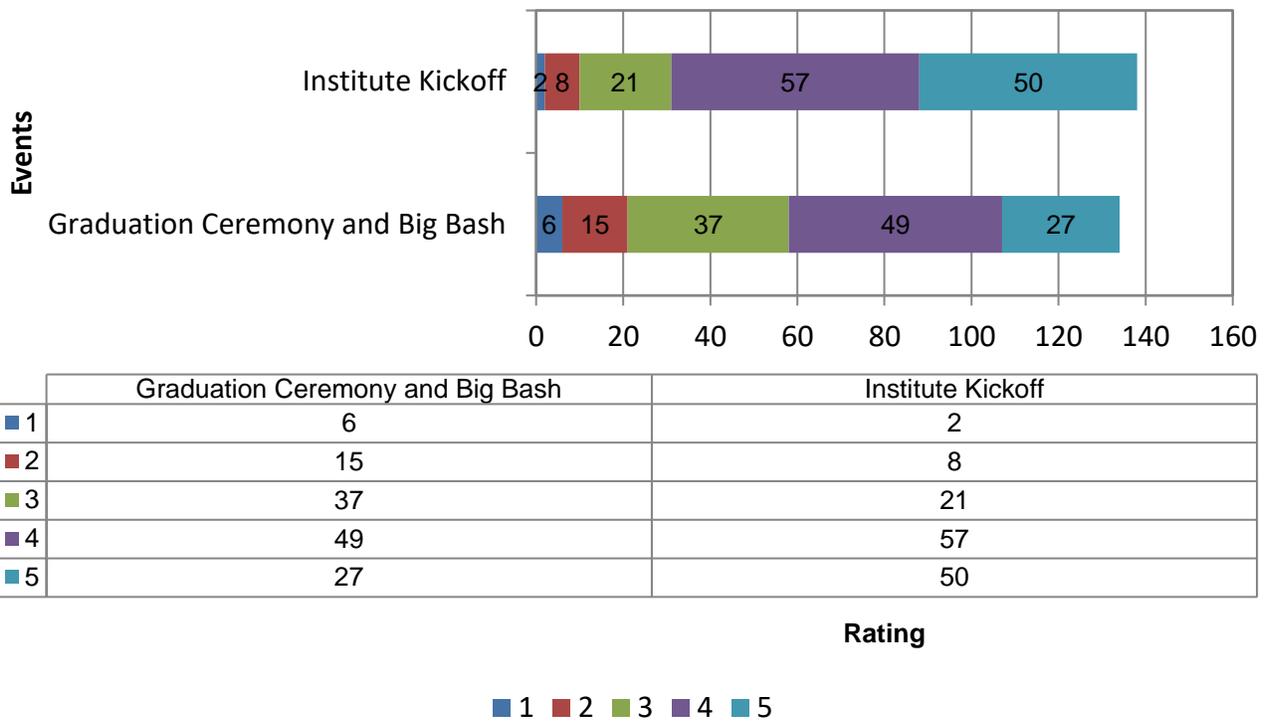


WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Was very happy that they were a dog-friendly hotel but the room had mold on the ceiling, carpets and all over the bathroom. It was pretty darn gross in there. They also had zero drawers for putting away clothes and only a small closet for hanging things. Staff was very pleasant however.
- Perpetual state of renovation.
- Tucson Marriott University Park was below my expectations. Modern, soulless decor, bland food, and possibly the worst designed shower head in history.

Q10 Please rate your experience at the following Institute events.



Q11: Additional comments about events*:

- Kick off was not as exciting as it has been in past years. I wish graduation was at the J W Marriott as it has been in past years. I feel the ambiance, food, lighting and sound was far better there than at the university Marriott.
- The Big Bash was little underwhelming. I would have liked to have seen it be a little more of a celebration for the graduating class. Some photos, video, testimonials of their time with IOM. The room was very crowded and a little uncomfortable. The food was MEH and bars were hard to get to.
- The reader at Big Bash seemed rushed to get through the names. I'm not sure if that was intentional or not, but it was hard to follow along.

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



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- The only criticism of Big Bash is specific to the host hotel, not the event itself. I know that IOM puts a great deal of effort and time and energy into all aspects of the week, but I have to point out the complete letdown that the Graduation and Big Bash are. Last year I assumed that with the lack of use of the UofA that we were accommodating and that was why it was organized as it was. When this year repeated I felt I should say something. As chamber professionals, we KNOW events, and what I experienced felt so off and clumsy I was shocked it was organized by chamber professionals. I understand space limitations but wonder if we better serve our graduates by capturing the audience better. If you were to even do a brief welcome and then serve dinner and follow with the program and then music and networking it would be so much better than trying to accomplish everything at once. I feel there is no focus on those who organize and make IOM possible and even less on those who worked for four years to achieve such an important milestone. I know that money and set up must be an obstacle, but I hope there is a way to work within the constraints we have to make it more meaningful for everyone. Not the fault of IOM, most likely Marriott, but the DJ was absolutely awful and unprofessional. And the abrupt kick out we all received was uncalled for. I know that my class would be willing to all kick in money to keep them going later and hire someone who knew what they were doing. The DJ was "meh" but the dinner was great. Please see my comments above for the rest of my experience.
- Graduation Ceremony itself was good, entertainment and ambiance no so much. Just not celebratory and the music was mediocre. Didn't event dance much.
- The graduation ceremony was great, but if we will celebrate the graduates with a "Big Bash", in my opinion, we should have something more than just a DJ for a half hour or just end it with the graduation and allow people to do their own thing at surrounding local businesses.
- The kick off seemed very unorganized. At graduation the reading of the names felt very rushed and you couldn't really hear the name that was read. Honestly, no point in having the dj if he is going to quit playing so early.
- There needs to be a better sound system at the Big Bash. Also a professional photographer.
- The food was not as good this year as it was last year. Definitely better than my first year.
- Graduation Ceremony and Big Bash, the graduation was excellent, I felt the ceremony ended too soon, as our class was starting to enjoy ourselves, the event ended. Wish the music would have lasted longer, a lot of classmates ended up going to other places, it would have been nice to stay in the motel to continue being together.
- Big Bash venue and food sub-standard. Decor very basic and food was not very good.
- I think the Graduation Ceremony and Big Bash could use a little work. The ceremony should really probably happen during or after dessert. It was very distracting to have everyone already eating and talking during the ceremony.
- The Sunday session could have been dropped, saving my chamber the cost of one night's accommodations. While some people may find the rah-rah, school-spirit, cheerleading aspects energizing, others find it draining and alienating. As for the graduation ceremony: it's a long trip to pack for and space in my suitcase was at a premium; is it really necessary to bring a suit to wear for one function? And the food was awful. Still a nice enough event.
- The Big Bash was a lot of fun, the seat dinner and event itself was a great networking opportunity.
- Terrific events!



ATTENDEE SURVEY RESULTS AND FEEDBACK

- I recommend just doing away with the DJ and dancing. This year, even as a fourth year, I felt like the awards got short changed and were rushed. I recommend picking a place following for the after party and let people gear that cost on their own. My the award ceremony about the attendees. Hell even invite someone inspiring to speak. I am not talking about the agents for the fourth years but someone else. Could be a faculty member or someone from the Tucson community.
- Food at graduation was alright, chicken was bland, veggies were too soft and the black beans didn't taste well, dessert tasted like a freezer. Was disappointed in the after graduation part, the stage was too dark, people left. Piano music or jazz would be better for this type of event. Perhaps this should only be a 1-2 hour celebration. Also, someone snuck in alcohol in a backpack.
- The Kickoff was fun, a good note to start off on. The Graduation ceremony was also fun and lively as it should have been. The end of the part was a bit abrupt (actually it was rude), and I think it could have been handled in a more subtle, customer friendly way.
- Graduation was hard because no one was paying attention. I did attend Midwest for my first year and the facility there allowed for a different setup, with rows of seating for the ceremony, then a move into the dining room for dinner. It "forced" attention to graduation, which I felt was more respectful. Given the facility and that there is not space for that at the Marriott, I'd at least suggest not playing music. . . The meal was, well, chamber chicken. I did not leave hungry by any means, however.
- I was a little disappointed in the Big Bash. The graduation ceremony was very nice but the dinner was a little disappointing. The DJ and conclusion of the evening's event was poorly thought out. I think we danced for about 45 mins before he announced the last song and light came on. I understand the thought behind the continued celebration and to take it out among the bars and local establishments. I would suggest either cut the DJ and do just the dinner reception and graduation ceremonies or extend the celebration with the DJ.
- It was so hard to experience the graduation and big bash at the Star Pass and then to be at the University Marriott and how different and less important it felt. I don't know that much was different other than the venue. I also felt like there was inconsistency about the class speakers as we were told we could only have 1 speaker and the other class ignored that and brought 2. That should have been corrected on the stage. The DJ was rude. Any time we went up to make song suggestions, we were "barked" at about whether he liked the song or not.
- Honestly, as a group who often specializes in event planning and putting together award banquets, I expected a bit more in the program and decor. It was ok but really wasn't "wow!" I know you all have many irons in the fire so, maybe a committee could take on just the Big Bash planning (possibly even the 4th year students..?)
- While they were fine if you were a first year, it was hard if having a comparison (to 2017 and 2018), presumably before budget cuts. Preferred when there was a reception after the Kickoff so we could socialize with other attendees and when graduation ceremony was at Starr Pass and felt more special. The timing/lighting/DJ seemed off this year for the reception.
- Softer music played during the Big Bash especially before and during dinner to make it easier to have conversations. If the dinner area is not ready have a spacious area available to wait instead of everyone being jammed by the bar. It was extremely loud and made it difficult to concentrate.



ATTENDEE SURVEY RESULTS AND FEEDBACK

- In all due respect, this was a disorganized and disrespectful mess. In the past, you did not eat until the presentations were complete and I do not remember this much noise during the speakers and presentations. How anyone could hear who was graduating? Having the salads on the tables and not providing any guidance as to how the process will work - being considerate and professional while staff/board members were speaking, not eating until graduation was done, might have been helpful. Or, not have any food on the table until graduation was done. There was constant talking and clanging of dishes as years 1-3 ate their salads. Many times people had to clang on glasses to get people to quiet down. For the most part, year 4 class members refrained from eating until the graduation ceremony was complete but they even were not sure what to do. The meal was average at best. I understand we are in the Southwest, but after three days of southwest for lunches, a more neutral meal would have been better. And, to charge \$85 for my guest to attend for dinner and two drinks was shocking and close to ludicrous. Coming from a Chamber background where we provide programs, even one of our top luncheons would be \$40-45 per plate and be a much better meal. Maybe it was the venue who drove that, but \$85 was too much for that meal and drinks.
- I really enjoyed the networking aspect of the kickoff that we've done in years past. The food at the big bash was just okay, but I know a bunch of people who went out afterward for real food. It seems like a waste that a meal is provided but pretty much unappetizing to the attendees. Also, I didn't see a ton of people on the dance floor. That also seems like such a waste of funds - and maybe a redesign or something could be looked at for the future.
- Food is consistently poor.
- Three years ago the Big Bash offered music when classes were walking in and professional photographer for all class pictures, not to mention the venue. It seems the budget for this event is slowly decreasing. It would be nice to have a professional photographer available for the state and class photos or even have him/her available throughout the night for the professional headshots (at additional cost to attendees) Institute Kick-off: seems very uneventful compared to three years ago, I don't see the value of having the kick-off off-site, if registration is at the Marriott have the kick-off at the Marriott too. Maybe one day the renovation will be finalized.
- Kickoff was good - a nice way to meet and see all of the board. The big bash was a bit disappointing. We all felt it was too short. We all started to loosen up and dance and the music came to an abrupt end. At 9:30 it was kind of an awkward time to make alternative plans. Some people went out - I stayed in. I would have loved hanging with people a bit longer but wasn't up for investing in leaving the hotel at that time. I felt the bash should have lasted an hour longer.
- Rules seem pretty strict---no bar at certain moments. Strictness of opening the door.
- I live in Alaska and had to fly in on Saturday in order to make Institute kickoff - it didn't feel like a sufficient enough event to spend an extra 2 days (and weekend away from my family) in Tucson. My advice - make this more!! Or maybe this could become an optional event.
- The food at the graduation and big bash was not of the quality one would expect for this type of event. It seems odd that we are given drink tickets but that there are so many restrictions on their use...only at certain time...not at all bars. And just when the fun got started, it was time to shut it down? Was there a time constraint with the hotel for noise? Or the DJ? It seemed short.



ATTENDEE SURVEY RESULTS AND FEEDBACK

- Graduation was so anti-climatic. Food was fair. Availability to the bar was poor. The DJ was terrible and the lighting was horrible. I felt bad for class 4. I understand that budget can make it difficult to have a nice event but I have taken multiple classes at IOM that talk about events, planning, etc. and this was an event of what not to do. A speaker this week said that if you wouldn't attend your own event, then kill it. My class is already talking about doing something different in two years because of the negative experience we had this year.
- Big Bash was a huge disappointment. In the Chamber profession, we host events regularly and have a knack for it. Considering IOM is a high level of professional development, the Big Bash should reflect that, but it fell way short. This event was one of the poorest executed events I have ever attended. The run of show was very odd and did not flow well. The only positive is that the food was decent. I know planning an event from a distant location is tricky. Consider engaging the Tucson Metro Chamber to help with the event logistics or form a task force to help execute the event. It has so much potential!
- Long wait for food. Only one bar open.
- Again, the food at the big bash wasn't very good in my opinion as compared to the food at the University. I was very, very pleased with the quality of food at the University (breaks/lunches, etc.).
- Kick off is good, short and sweet.... Graduation... I was a little disappointed in a few items... 1.) I waited in line outside for 20 minutes for a drink and just as I was next to get a drink someone shut it down, rudely. There were only 4 of us left in line, we could have gotten a drink and made it into the venue with no trouble. 2.) once I did get into the venue none of the bars were open and then when they did open, the back bar did not even take tickets so I had to go to the other bar. Not sure why both bars don't take tickets? 3.) I really wish we had more time with the DJ and to dance, even if it was until 10pm. It went by way too fast and we couldn't really get into anything because of the ceremony, onion salads (haha), and photos.
- Kickoff is a little overwhelming for first year folks as you really have no clue what is going on. But, staff were great about explaining things. Graduation and Big Bash were fun, but quite chaotic. As names were being announced for graduation, we couldn't hear them because of all the cheering, hollering, etc. I get it, it's a celebration.... Also, consider having designated reserved tables for the first year class, please. (Again, because we have never attended before, we don't really know what to expect.)
- The kickoff and homeroom don't seem necessary, especially for fourth years. Having been to other graduations, I felt ours was not as special, especially the food.
- The kickoff is a great "get to know you" and pep rally! By the time we got to "Big Bash" it seemed the thrill was gone. I really feel this professional certification deserves a much better celebration. The staging, sound and photography were either below par or not present. I feel as though this event could get some sponsorships to help fund enhancements, etc. This is a big deal for the people who graduate and I felt really bad for them because it was rushed, the staging was minimal and dark and they had no photographer. As a Certified Meeting Professional and a Chamber VP of Marketing, this event is not what it could be, not even close. I'm happy to help plan this event in the future.



ATTENDEE SURVEY RESULTS AND FEEDBACK

- Institute kickoff was great. Enjoyed the opportunity to meet classmates and really loved that there was something planned for dinner right after. It was a great way to get to know everyone and catch up with old classmates the first day. The Big Bash however was quite a disappointment. The onions on the salad were so strong that the entire room smelled. Everyone at my table picked them off their plate. The flow of the event seemed extremely awkward. We were all done with our salad and waited through the entire graduation ceremony plus an additional 15-20 minutes before receiving our food. It would have made so much more sense for the food to have been served prior to the ceremony or to have served the salad right before. To top off the delayed service, the main meal was almost inedible. The chicken was bland and I am not even sure what kind of sauce was around the beans, but it was extremely unappetizing. I ate about two bites before I gave up. Knowing that it would have cost \$85 to bring a guest to the event, I would have expected a much higher quality meal. By the time we left the event, it was much too late to go get dinner elsewhere so I ended up not eating much at all. Overall, not a good experience for something that we are expected to attend.
- I think it would be nicer to have the Graduation Ceremony in one space, and the dinner in another, so that all of our attention is on Graduation. Or, don't have dinner being served until the ceremony is over. It'll make the evening go a little later, but the speakers and graduates deserve our full attention.
- Kickoff was a waste of time to me. I love seeing everyone, don't get me wrong but it didn't make sense as a 4th year to be there. Would have been better spent going to class and not having to attend on Thursday after graduation. The Big Bash was disappointing. Where was the intro music as we walked in? Pretty much a downer... would have been nice to have the Regents lead us through the room instead of the lackluster short walk around a few tables.
- Institute Kick-Off is nice, but pretty standard. The Big Bash however could use major improvement. The food was subpar, the DJ lacking, and it ended at 9:30 when people were still dancing. I also was disappointed to hear that the 4:1 graduating class was not able to sing a song during their "speech" time. All week we're taught to be innovative and "think outside of the box", yet shut-down when it comes to being creative with the graduation ceremony. We're Chamber people, we're creative and fun by nature, don't shut it down. It would also be more engaging for those not graduating. Something to think about.
- These both used to be much nicer and much more involved. It felt like there was a concerted effort to save costs on these events, which was unfortunately not reflected in a decrease in tuition - i.e. we paid as much as before and it felt like we got a lot less for the money.
- The kickoff was fun -- it's just rough that it's on Sunday. It adds travel costs and time away from home for people as I already described. The Big Bash needs a total overhaul. It's like being at a wedding you really didn't want to go to but feel obliged to. I talked two first year students into attending it who were staying at my hotel, and I felt bad about it afterward. I thought maybe last year was just a fluke and that this year would be better but it was actually worse. The food was terrible and the service was too.
- Big Bash was good, ended too early! We were still dancing! Food was not that great. It was better the year before!



ATTENDEE SURVEY RESULTS AND FEEDBACK

- Big Bash was ok...there wasn't enough plated food for everyone at our table. Also, perhaps a little more in the decor department. This is a big deal. Maybe a video screen and a camera so those in the back can see although I realize that is a cost factor.
- My flight was late Sunday...I missed it!
- I was really disappointed in the kick-off. It felt much less social than other years, perhaps the style of the room. For the Kickoff, the auditorium was a much better location than 2019, but not as nice/energizing of an event as 2018. The "Big Bash" was nicely done, however I missed the "walkup music" for each class -- that was fun in the past. It's not much of a "bash" if the DJ music ends at 9:30pm. Maybe have 2 different people saying names of the graduates as it sounded like Erin was getting tired/lost her voice at the end.
- I don't understand the kickoff, it's really not useful, seems most of these announcements could be handled during weekly lunch breaks or be prerecorded and sent via email ahead of the institute session. The big bash dinner was underwhelming. Also, half day Sunday adds an extra travel day.
- I liked pictures were taken prior to graduation.
- Kick off is just boring. You need some music playing and the regents need to be engaging with the others. After attending West and seeing their graduation, the one in the ballroom at the hotel is just lacking. There have to be additional facilities in Tucson that could hold our group and have it more elegant and kick it up a notch. The food was better than last year but please do not put raw onions on that many salads. It overpowered the room and we had people at our table that were allergic to onions and had to leave the room due to becoming sick. I would think that there might be some national companies that would like to do business with our attendees that might sponsor some of the event allowing you to move locations and make it nicer.
- The kick off was MUCH better than last year being in the auditorium with a little more space. The bash seemed very rigid. While I understand that this is a industry event, the classes not being able to have music to enter by after seeing classes before them have that opportunity, I feel is demeaning. The lack of respect and professionalism by some (I cant stand people talking among their tables) during the presentation have affected the whole and it has made the event suffer.
- I heard Big Bash used to take place at Star Pass Resort...much nicer accommodations than the Marriott Park. Would have been more than willing to pay a little extra for registration. Overall, Big Bash and graduation was nice and respectable.
- The Big Bash seemed rushed. the way the bars were set up didn't make any sense, one bar took only cash and another way on the other side of the room took tickets.
- Kick off was fine. We could really do much better at the Big Bash. I know our class would love a better meal (within reason) and more party-like atmosphere after the dinner. Bright lights and a hotel employee clicking songs on his computer isn't what most people expect for a "bash." I think even going off site wouldn't be the worst idea. We are all professional party-throwers as Chamber/Association executives and can do better. Four years of commitment, time and money should boil down to an epic celebration. Let's find a way to commit more resources (or whatever is lacking) in the coming years.
- The kick off was okay,, the graduation seemed rushed, like you wanted us out of there. And the DJ was meh, how much more would have small band been? I did like the champagne toast, that was a nice touch.



ATTENDEE SURVEY RESULTS AND FEEDBACK

- The "Big Bash" was horrible. Seriously, we are all event professionals and that's what you gave us for a "big bash?" Let's start with the food - atrocious. Disgusting and no flavor - Chamber Chicken? Really? It was gross and you all should be ashamed that you let that pass. Second the program. I think the timeline should be revisited. Have the graduates walk-in, then sit. Board chair say a few words. Everyone eat salads, everyone eat dinner. Then have ceremony - when everyone is paying attention - instead of eating the salads. After the salads, everyone got up and doddled around for 20+ minutes, while the rest of us were wondering what the heck was going on? Was that it? Were we getting dinner? Then "dinner" was served, half the people weren't sitting down any longer. Some had actually left the entire event and went elsewhere for dinner - an actual meal that tasted good. While the rest of us were left wondering again, what the heck was going on. Meanwhile the "DJ" was blasting dance music during the "meal" and even if we wanted too, we couldn't hear our neighbor to have conversation. Seriously worst banquet event I have ever attended. I am so disappointed.
- Didn't attend the Big Bash this year. Last year, was painful to sit through and instead a small group of my classmates went out to dinner.
- I felt like the graduation ceremony was unorganized. I felt like graduation rehearsals should have walked everyone through the entire process so we knew what to expect.
- Horrible food.
- Love how casual Sunday afternoon/evening is. Getting to meet everyone and mentally prepare for a full monday. Ceremony was fine! Full of recognition and fun. Food was good. The Big Bash however was a little sad (ending very abruptly and early) and actually an inconvenience - splitting up the group and suggesting people turn in for the night or find somewhere else in town to go to celebrate. If i were a 4th year, I would not want to end my IOM journey like that. Alone at a bar ... with only 2 other classmates who got an Uber to a local bar because the Marriott party got shut down so soon ... with a single tear rolling down my cheek. But really, lets keep the group together.
- I feel that I would rather have class on Sunday afternoon/evening after registration during my fourth year so that way we can be done after graduation on Wednesday. After one or two years of the kick-off, we already know the information and feel we could better utilize the time.
- The grad ceremony seemed pretty long and uneventful. The speeches were not inspiring to me. I might feel different when I am a 4th year-er. Personally, I would have liked to have had a program with a few pictures and inspiring quotes from those graduating, even if it was in the form of a place mat. The food service, timing and taste was less than what I expected, even for a first year-er. I did not stay for the music afterward.
- The Bash was great but could use a few programming tweaks. Either no salads (or any) food on the tables until the 'ceremony' portion is complete or eat the full meal before the ceremony. It tends to get loud with people eating with speeches going on.
- DJ ended earlier than we had expected. Time crunch to get pictures, and eat along with the ceremony. Maybe assigned tables for the class would help the classes stay closer together.
- Difficult to hear and be engaged at the same time of dinner service. Confusion on the bar service, which bars were open when and who took drink tickets and who took cash. Also seemed to finish earlier than scheduled?
- Big Bash could've gone until 10 pm or forego the DJ.

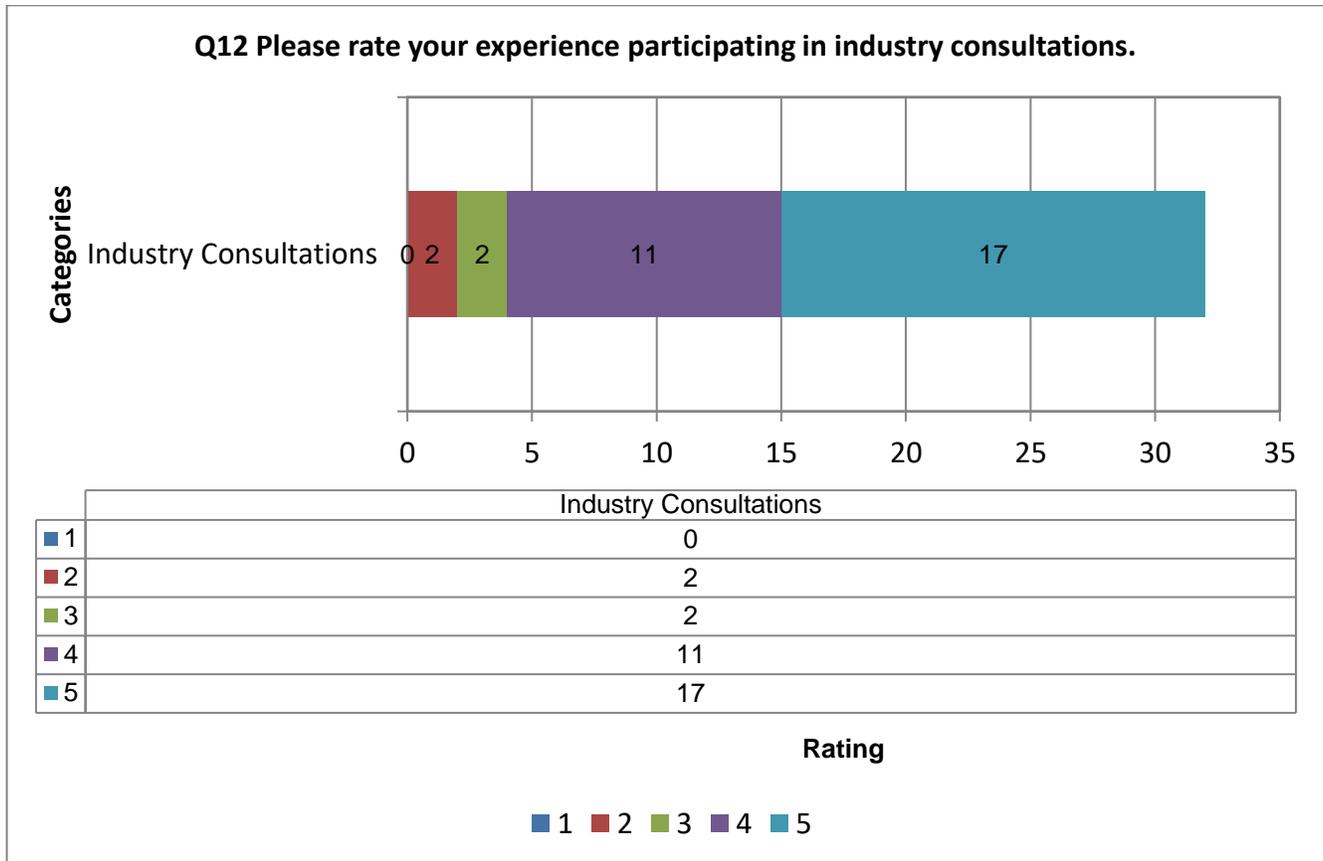


ATTENDEE SURVEY RESULTS AND FEEDBACK

- The room felt crowded. The waitress for our table was not attentive to our needs and was too quick to remove items from our table. About halfway through the evening she stopped showing up completely. We had to ask another server to bring the dessert to our table.
- Graduate recognition was rushed (we couldn't tell which person matched with the name being called). Graduates put a lot of time and effort into achieving this designation, so it would have been nice for them to receive a little more recognition. Also, the fact that the entire event shut down at 9:30 was unfortunate. Students work really hard all week long and don't have much downtime to visit with each other on a more relaxed level. Big Bash is when we hope to do more visiting and having it end so early didn't allow for that.
- I had a lot of fun at big bash, but the hotel staff kicked us out pretty quickly.
- I think it's time for Institute staff to take a long hard look at how they are doing the kick-off and the Big Bash. The big bash especially, is stale. I don't mean this to offend anyone but it is classic chamber, "stale, pale, and male." You have top chamber and association staff from across the country who are either paying for institute out of their own pocket or their employers are paying for it and allowing them the time out of the office to attend and it feels like the celebration is sub-par. One of the sessions I had this year was on events and the speaker said, "you need to think about if you want to attend your own events." I would challenge Institute staff to think about this, because it appeared from the body language I saw from both staff and Board of regents that they couldn't wait to get out of there. The food is horrible, "chamber chicken" which we all joke about but I can tell you there is no way I will be inviting my husband to the graduation when my time comes because it is not worth \$85.00! AND the 'Bash' isn't really a party. The DJ looked like some guy who was found in the back alley and couldn't wait for his next smoke break. Just when everyone is having fun and getting into the celebration spirit, it's lights up and over at 9:30 PM. It's not a BIG BASH... It's not even a fire cracker that fizzled. Here's the the thing, you have a room FILLED with people who plan events for a living, what kind of event do we want to go to?... ONE that is over the top and amazing, that INSPIRES us! And as far as the kick off goes, It doesn't feel necessary. I have to give up an entire weekend with my family because there is no easy way to get to Tucson, so I leave on Saturday, I still had a major delay due to weather and was concerned that I wouldn't make it to home room on Sunday in time and then I do make it and it feels like a waste of time. Maybe for year 1 students for orientation it makes sense but not sure it is beneficial and honestly having to arrive by Sunday afternoon is stressful. I'd rather see the program run Monday-Friday.



ATTENDEE SURVEY RESULTS AND FEEDBACK



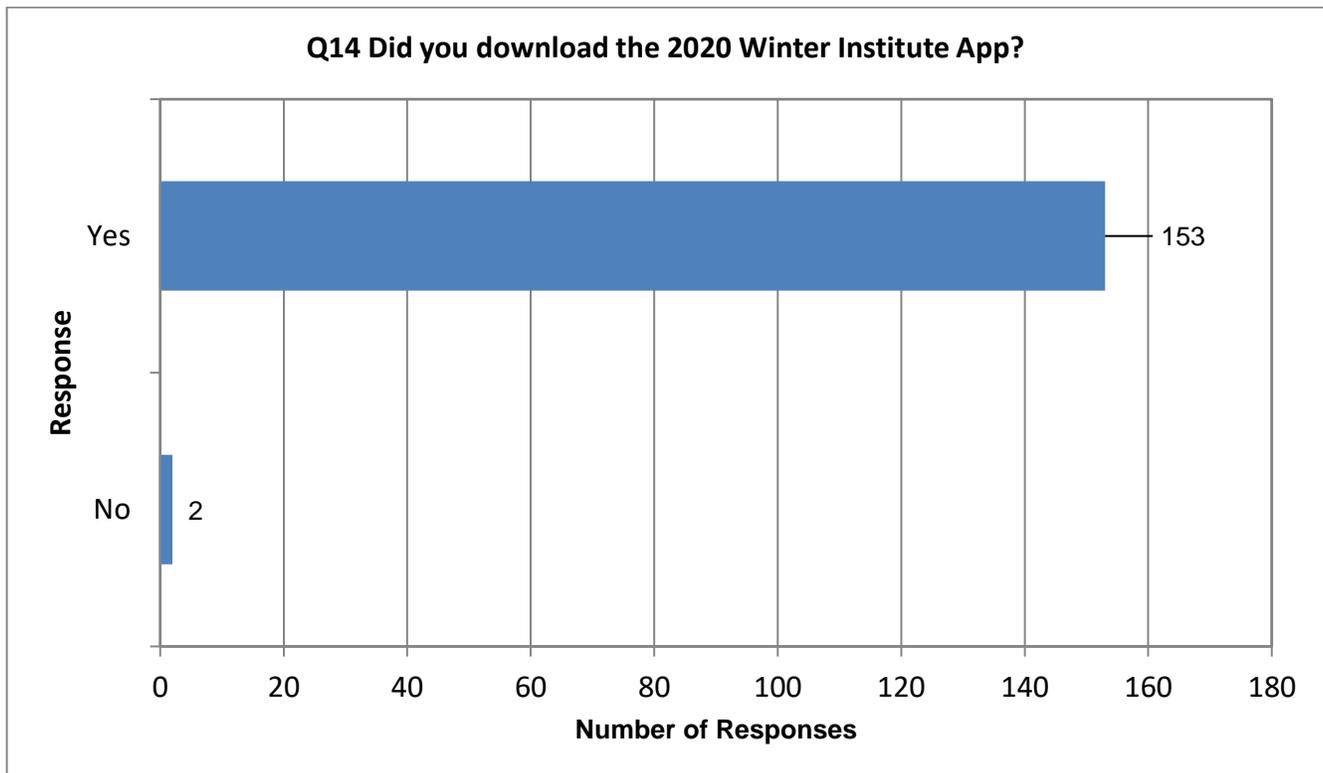
Q13: Additional comments about industry consultations*:

- Great information from [removed] -- although she missed our first scheduled appointment as she was on her phone while I waited.
- I wanted to do this but never fit it in the little time we had.
- I cannot thank my consult enough. I needed direction and feedback and I needed it to be honest and I received and more. This is a great service to us all. Thank you!
- I requested a consultation last year and never received any follow up so I didn't try this year.
- [Removed] was really helpful.
- I requested an industry consultation with [removed] and it went great! Helpful practical information.
- The one that I had was great. They are a little squishy though and for someone new can be challenging to schedule. A little prep for first years and beyond on how and when would likely benefit everyone.
- [Removed] ... exceptional as always...how does he know so much...lol
- I didn't take part in the consultations.



ATTENDEE SURVEY RESULTS AND FEEDBACK

- Met with [removed] and he gave me some helpful insight into the question I had regarding membership.
- I requested someone with specific experience on a specific issue, and got someone with zero experience. So it wasn't very helpful for me.
- Institute staff was so awesome, they made it so easy to work with them. Very responsive!
- Oh my goodness.... each and every consultant was top notch. The information they all shared was phenomenal. It will take me all year to decipher and put into play all I learned.
- Great opportunity I wish I would've taken advantage of. Next year for sure!
- I tried to secure a consultation with [removed] and was not connected with her.
- I didn't love all the many texts encouraging me to buy something at the silent auction. And it made my phone ding during class which I felt bad about.
- I requested one, but it never got scheduled, even with the class adviser engaging.
- My consultant was fantastic, he really helped me talk through a lot of the challenges I'm facing and gave me new insights.

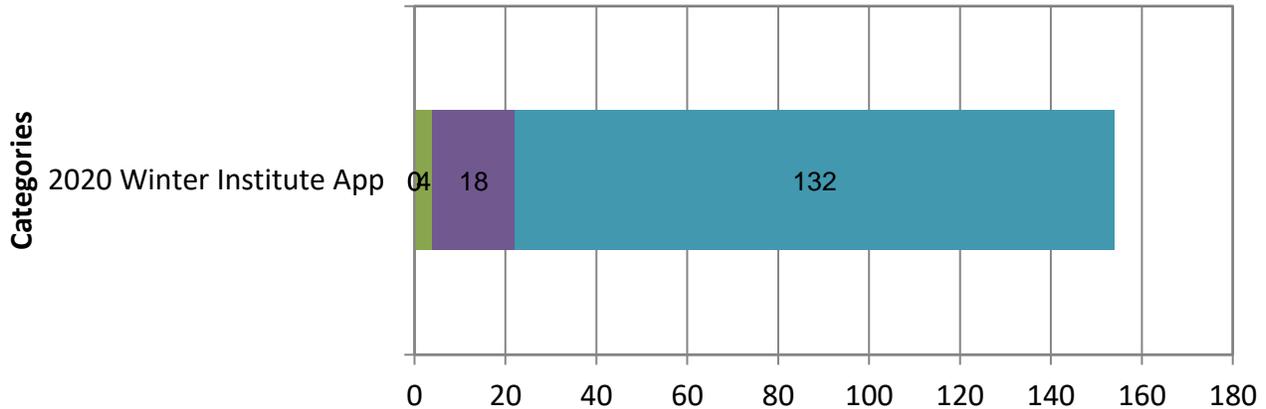




WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

Q15 If you downloaded the app, how beneficial was the app to you?



2020 Winter Institute App	
1	0
2	0
3	4
4	18
5	132

Responses



Q16: Additional comments about the app*:

- Very helpful with lots of information at our fingertips. Much appreciated.
- I had trouble with the app so accessed using the web. There was no info listed for faculty otherwise it worked find.
- The app is vitally important.
- Loved the app. I wish all of the instructors had their materials uploaded to the app on time, though. Still waiting for materials from some of the instructors.
- The app really helped me keep on track with my classes and where to be. I also liked being able to find my classmates and their info in the app.
- I like the map in it for the class room and the presentations.
- Love the app, although had to be reminded to use it! Appreciate having everything in one place, not having to print out all materials.
- There should be a least one sign with schedule and details for guests who are unable to use the app.



WINTER

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- Make it available sooner!
- Amazing. Would have died without it.
- I'd like to see if this app could be used as a communication tool instead of our emails.
- Loved having everything in one place.
- App was great this year!
- Loved having our schedule and the class presentations right there.
- The app is awesome! Better notifications the first day about state photos would have been good.
- It was great for my schedule. For its potential functionality with connecting with others in the program, it felt like I was the only one using it. Not so helpful.
- I liked that I could look up the attendees, find my classes, and other information provided by the app.
- So very helpful in quick finds to information.
- I love the WI App! Don't change it!
- Love the app!
- Loved it!
- Loved the app! Very helpful to see my schedule at a glance, connect with others in attendance and have all the documents attached for each session.
- It is so nice to have a play by play at your finger tips at any time of the day! I appreciate the app greatly! It is so much useful information in one place! The fact that it is user friendly makes it awesome, too!
- The app is great!
- I used the app multiple times a day. My search function didn't work in the attendee roster, so it was super helpful to have the names alphabetized by first name. I don't think it was clear that you had to "release" your contact information for others to see it. Communicating that in the kick off document or having the class advisor make that as an announcement would have been helpful.
- The app is fantastic. I REALLY like it.
- The App was so helpful. It was a quick way to reference everything.
- Love the app!
- Great and easy to use.
- That was what I used to see where my elective classes were being held.
- Very useful and easy to access/ use.
- The app was awesome. Per my previous comment I think we should use that more prior to institute.
- The app was good, but I would prefer to still receive a hard copy of my personalized schedule with electives, etc.
- The app was great. I just wish all the instructors had uploaded their presentations in handout format.
- Fantastic app - seriously, everything was there!
- Definitely keep it. Thanks!



WINTER

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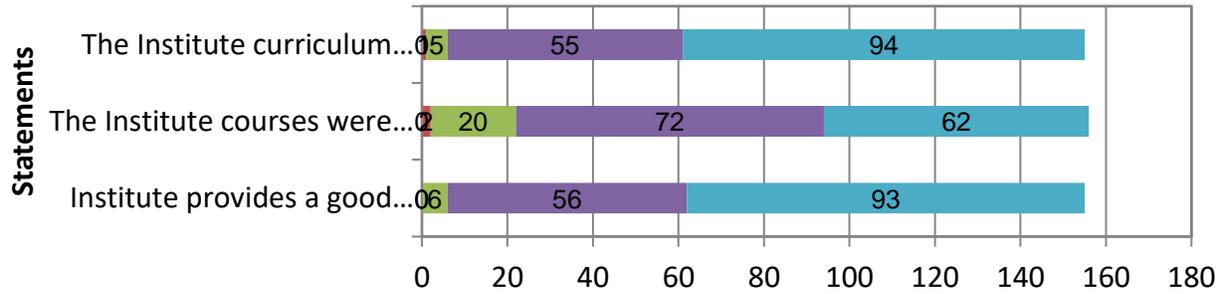
ATTENDEE SURVEY RESULTS AND FEEDBACK

- I can't think of a thing to change - it was so helpful, this year and last. Especially with Bidr and the maps!
- Loved the app. Especially when looking at electives and being able to switch if possible as you learn you might want to take a different course.
- The app was great and easy to navigate. Such a great way to find all required information.
- Having to go through the verification process each time that I used the online version was a bit cumbersome.
- App seemed easier to navigate than last year. I really liked the addition of the auction platform this year so everything was in the same place.
- easy to use
- I loved it! It was so easy to use and a great resource as to what and where my next class was. I didn't have to scrounge around for papers.
- The app is great! Definitely something I would recommend using in the future.
- Really enjoyed the app and found the info useful. Thanks!
- It was nice to have the schedule, but other than that I didn't really use the features.
- The app is great to keep me on track, download presentations, etc.
- The Bidr portion was a bit dicey at times. It would kick you completely out and sometimes require you to log back in.
- Great job. The only thing that could have made it easier to use would be if the floors were different maps. It was a little hard to find where you were going at first.
- Loved it!
- Great app, very valuable.
- Very beneficial... now I'm trying to figure out how to get all of the files from the app to my computer? I haven't really looked into it yet but I'm hoping it's easy.
- Many of us like to prepare for Institute BEFORE leaving home, so having the slides prior to class is really helpful for note taking and such. I'm sure you try to get faculty to upload content, but it is tough when you are in class and are told they will do it later (especially when it means you would have taken less notes if you had the slides).
- App was very beneficial - please keep for next year!
- Great tool.



ATTENDEE SURVEY RESULTS AND FEEDBACK

Q17 Rate to what degree you agree with the following statements.

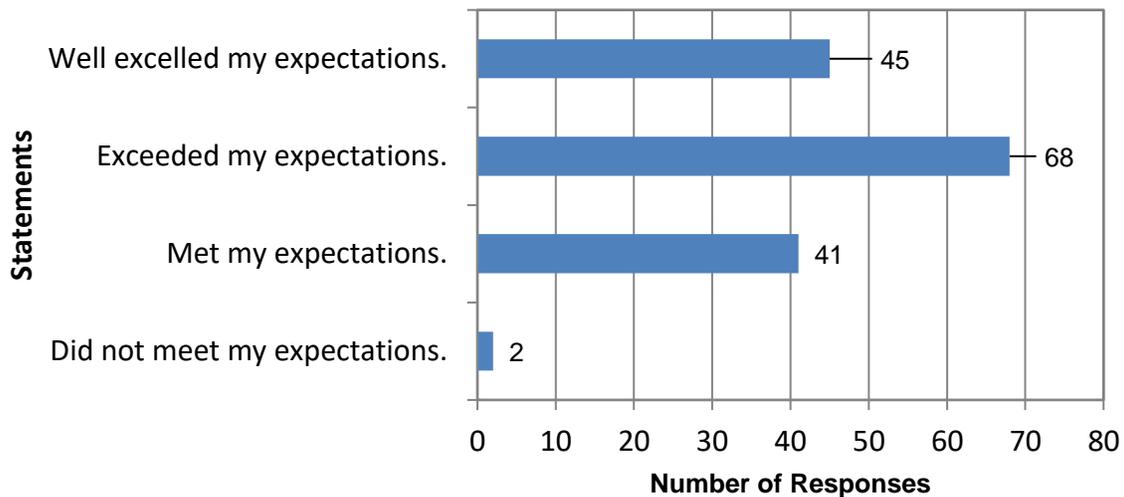


	Institute provides a good networking opportunity in nonprofit management.	The Institute courses were conducted at a suitably challenging level for me.	The Institute curriculum provided valuable professional development.
Strongly disagree	0	0	0
Disagree	0	2	1
Neither agree nor disagree	6	20	5
Agree	56	72	55
Strongly Agree	93	62	94

Disagree or Agree Distribution

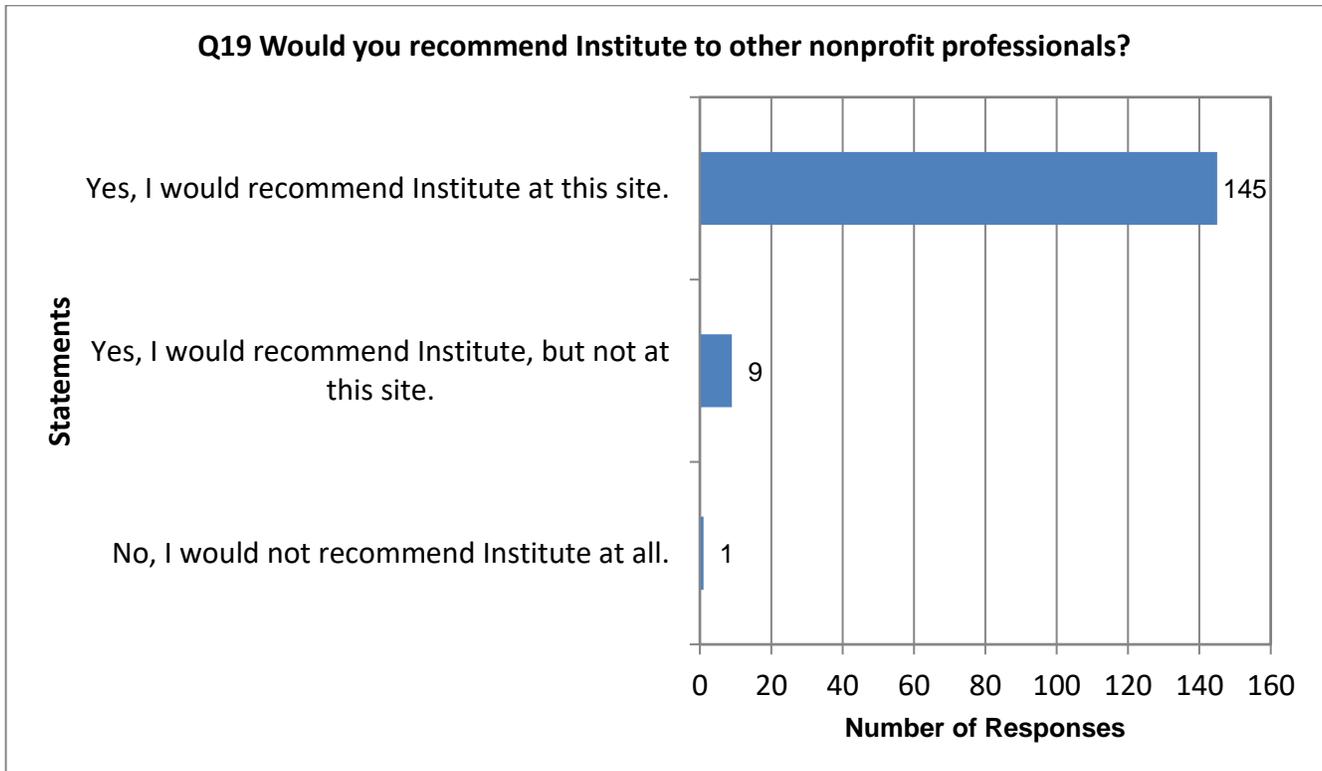
Strongly disagree Disagree Neither agree nor disagree Agree Strongly Agree

Q18 Overall, to what extent did Institute meet your expectations?





ATTENDEE SURVEY RESULTS AND FEEDBACK



Q20: Additional general comments*:

- I had a wonderful experience all around. The curriculum for the most part was fantastic, and the people were even better. Really looking forward to next year.
- Overall everything was great! It keeps getting better year after year. I felt the classes this year were on point for where I am professionally. I did give individual feedback on each class so you can check that. As I'm sure you hear, year after year, the camaraderie and classmates is what can make or break your week there. We have the BEST class ever and am so thankful for my IOM classmates!
- Overall, I thought that the classes were much better for year 3 (than year 2). There was one MISS for me. That class was [removed]. I was very interested in the topic and what I might learn from this class as DEI planning is big in our industry. The description read "Inclusive leadership is paramount to successful orgs and thriving communities. Equip yourself with the tools necessary to create a community that is welcoming to all". That is NOT what was presented. We encountered an odd mix of information, dates, and facts related to some aspects of DEI delivered in a way that made dialog uncomfortable and non-existent. I would not recommend having this instructor back.



ATTENDEE SURVEY RESULTS AND FEEDBACK

- The campus was beautiful and the education spaces were great - except for our class, which was in the lowest level. It was very chilly with dark lighting and skinny tables. We didn't even really have comfortable chairs and with concrete floors, every time someone got up it was very loud. There were a few times we had disrupting noise from the 'open air' hallway. We made it work. The instructors were fabulous! Kudos on getting some of this industry's best presenters. I only had one that 'read off of the slides' 80% of the time but that was an elective so I'm not heartbroken over it. Our class advisor [removed] was awesome. He was always advocating for us, trying to help fix the issues with our room and he was very engaged with all of us throughout the week. HUGE improvement over last year. Our class has requested him back even though we know that is not done. I do believe that there are invaluable connections made at Winter Institute. Both on student and faculty levels. One more suggestion for the 2020 class is if you break us up to help with class size, I recommend putting the fast-trackers in the second class. Last year we did say that we wanted to stay together but now that the original class is much smaller, we could probably make an average sized class at this point. It would take some strategic thinking but it would make a huge difference for those of us who are 'staying Winterized' our whole journey. Thank you for listening and any negative feedback is meant to help improve the program, not as a slight to anyone's hard work.
- I like that the dates are already set for next year for planning purposes.
- So many wonderful people made Institute fun and memorable! Everyone was kind, welcoming and encouraging! Thank you all! The Arizona campus was wonderful! Love the fact that we had 30 minute breaks plus an hour for lunch. Gave ample time to get off our butts and go outside to walk around the beautiful campus and stretch our legs a bit. Food at the campus was great as well! Loved the healthy snacks and creative lunches! Plus, Starbucks right next door! Great place to hold Winter Institute!
- My head is still spinning from the education I received over the course of 4 days. The staff, attendees and instructors were second to none. It was great to hear others talk about their challenges and successes. It was comforting to me to know I was not alone in some of the challenges that are inherent in running a chamber of commerce.
- I previously attended West Institute. Comparing the two, I would definitely say that this location was much more appealing. The ability to walk to restaurants and to the campus was very nice. The food at this location was also better, but could still stand to be improved. As expensive as this week is, I would definitely expect better quality and some breakfast as well. Overall, the experience was great and I plan to return again next year, however I would love to see some improvements, especially with the Big Bash. I know if I were a graduate, I would have been disappointed the event this year.
- Some of the instructors were wonderful while some were more conversational; and though obviously very knowledgeable on the designated subject, didn't provide much actual information. Perhaps their presentations could have been more tailored and focused.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- All-in-all I had a great week and learned a lot. However, I do have a few suggestions. Our class 2-1 is large. I understand that. BUT, please don't put us in the basement next year. It was cold, dark and not very nice. None of us were happy about being put down in the dungeon. The meals were not good. I think you need to not have so many ethnic foods and do something that appeals to most pallets. The Indian food day and the paninis were really gross. The paninis didn't have any cheese or sauce left in them because they had been cooked for so long. I liked it better when we had breakfast and all the meetings at the hotel and then were able to have lunch on our own. It got us out into the community more. I didn't like the 10+ min walk to/from the conference. It was difficult because we weren't able to run back to the room quickly if we needed to. I thought the snack break food was good. I personally had a better IOM experience in 2019 than in 2020. I hope that 2021 will be better. For \$1400/attendee, I think you can do better. Thanks.
- The meeting space was freezing, the whole time. No access to powerstrips the first day that was remedied the second day. Food was good the first day and not the second. Break/snacks were awesome. The AM snack was enough to have been breakfast. Please break up 2-1. The class is too big to make deep authentic connections with more than 2-3 people, which is a huge asset from the IOM experience. More information about continuing education and how the IOM credits link into other certs would be helpful, please share!
- The room was very cold and I was disappointed with the Marketing instructor as this is an important topic with how quickly technology is changing. [Removed] are phenomenal!
- I really learned a lot in my first year and am excited for next January. Thank you to all who put this on, well job!
- You are going to hear this a lot from the Year 2 attendees, but our homeroom location was absolutely awful. We tried to make the best of it, and nicknamed the room 'the dungeon'. I run continuing education programs, and I would have never held day-long classes in that room. The lighting was terrible, there were technology issues with the LCD projector, the acoustics were bad (thank goodness the microphones worked) and the list could be longer. If there isn't another room big enough for that class for Year 3 at the Union next year, then another location nearby on campus needs to be found. Sonora needs to be taken off of the list for classrooms. [Removed] (our class advisor) went above and beyond to try to help the situation, including buying extra extension cords and power strips for student computers, but there was only so much he could do. I also started eating my lunches elsewhere, since food often ran out if you were at the end of the line for lunch. Soda and other beverages often ran out at lunch as well. I will admit, I was spoiled by the facilities at Madison, and can't wait to go back there.
- I have been promoting IOM participation at my association.
- The food at the university center was mediocre, strange choice of items sometimes. My class was in the Sonora room in the basement-terrible room, no electrical, cold and uninviting
- Overall IOM was good for my professional development. I found our adviser to be helpful and enthusiastic. Overall experience was good and I have already shared items with my board.
- Great experience. Content for 3rd year was exceptional. It's time to recognize [removed] with a plaque and invite another industry professional to present as his presentations are dated and repetitive.



ATTENDEE SURVEY RESULTS AND FEEDBACK

- I think Institute is the most valuable professional development I have ever experienced, including in my prior career in another industry. I have appreciated the many outstanding instructors we've had the privilege to learn from, many of whom are still available to us. At times it felt like some classes were covered by regents and/or other volunteers who did not seem completely prepared for those sessions, which was even more apparent in comparison to the other phenomenal instructors we had for other classes. I have been a little suspect of some of the attendance and other requirements and punishments for missing some class as they do not seem to have been uniformly required. For example, a classmate of mine was required to write a paper in less than 48 hours for missing an hour of class due to illness to be allowed to graduate. Last year, a member of the US Chamber staff who was in our class routinely flitted in and out of our sessions, and spent much of her time in class shopping online, and ultimately earned the same certification. I wonder if she was required to complete the same kind of paper? Another example: we were instructed to dress professionally for graduation, while the organizer of the graduation event did not. Perhaps making expectations more clear for these portions of the schedule would be helpful - is it intended to be serious or fun, or a combination of both?
- Thank you for creating a truly educational, professional development venue for the non-profit sector. The institute is far better than any ASAE learning sessions I have attended.
- It seemed that the Institute experience got a little less and less special with every year. Not within my class, the better we got to know one another, the better we got but just the bang for the buck.
- Institute exceeded my expectations even though the bar was already set high from the recommendations of colleagues. The quality of instructors was impressive.
- [Removed] was a great class mentor. Be sure to bring him back.
- The 4th year was the best year. Faculty was excellent, with the exception of one. The topics were very good and helpful. This was a very beneficial experience!
- In year 1, I was surprised at the quality of the programming. Thought I was prepared for year 2 - blown away yet again!
- The basement class room with no windows, poor sound, and no heat was not the best choice. The main auditorium where we held the opening session would have been better.
- I will continue to sing the praises of IOM. It is an incredible program and I hope my involvement lasts for many years to come. IOM validates that I was meant to work in this industry and gives me the tools I need to grow and develop!
- I would suggest having separate tracks for emerging leaders and experienced leaders. Some of the coursework represented more of a review of best practices rather than teaching moments.
- I would like to suggest a look at the schedule to possibly extend Tuesday and Wednesday to allow for easier travel opportunities in Thursday. We have one option on travel and it's inconvenient at best. Thank you so much to all of the staff and volunteers. You all did a fabulous job!
- I can't wait for next year!
- A great job to the staff and regents! I really liked how the big bash was at the Marriott this year; it made it very convenient. The only thing I would say is consider having the Sunday evening class for fourth years so we can be done after graduation.



WINTER

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

ATTENDEE SURVEY RESULTS AND FEEDBACK

- During my 4 years of attending Institute did felt like less than 40% of the content was could be applied to the association community. In your literature you mention courses in IOM help prepare you for the CAE exam, I did not find this to be true. I'm not sure if your curriculum mandates a certain percentage should speak to chambers and a percentage to associations but if not, perhaps evening content to speak to both could up your enrollment of association attendees. I would suggest if faculty is unable to speak to both you have either have the 2 faculty of offer it for both association s and chambers. It would also be helpful to know who would be teaching the course. I think improvements could be to make to appeal to the growing association world. My I also recommend having some sort of guide to help the advisors create more cohesive family type of experience for newbies to the class. I also completed the form to volunteer and would be happy to assist in anyway I can. Thank you so much for the experience. Excited to see the future of IOM.
- As a third year student we have been moved around a lot at the Winter location. This year was the most organized of them all! Loved having class in the student union. It was close to amenities and was not a far walk from the Aloft. The food provided was great along with the snacks. Again, the best choices we've received. The room were freezing but I'm sure you'll hear that anywhere you go. I have a suggestion to do the Bash in the Student Union Ballroom. It is equal distance from both hotels. Provides a stage and plenty of space (if not more for networking!) adding cocktail tables in the back where the bars would go would provide an opportunity for attendees to chat and get a breath from the dinner area but still feel connected to the event.
- Thank you for your time and talent in setting up such an intense, helpful training program for me.
- I thought all my classes at Winter Institute were relevant. However, there was at least one class where I recall the majority of the 3 hour session pertaining to local chambers. Most of that discussion was driven by the fact that 75% or so of our class were, in fact, chambers. But with that being said, it wasn't all the relevant to any association attendees. Loved Institute as whole though. I'm considering whether I stay at Winter or if I go to the Summer Institute, where it's my understanding that there's a lot more association attendees.
- I didn't realize what I was exactly signing up for. It exceeded my thoughts and I will come home with much more implementable material than I had planned for.
- 1) It is my understanding that the curriculum is set to accommodate the chamber and association knowledge base requirements. However, based on my experience in this class, it seems faculty need to keep this mind. Some content of core courses was totally focused on large sized chapters only.
2) The titles of the sessions are somewhat misleading. Please make sure they are reflective of the content.
3) Few topics are missing and I recommend adding: a) Artificial intelligence and how it is affecting the nonprofit operations. b) Soft skills and emotional intelligence are more relevant now-a-days than education. c) The emerging new business models of associations.
- Thank you to the Institute staff team for your hard work in putting together a great program.
- Too bad there isn't a way to put the 4th years last class another day other than Thursday morning.
- I liked the fact that the caliber of instructors and courses were at third year level.
- LOVED IT.



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ATTENDEE SURVEY RESULTS AND FEEDBACK

- As a fourth year, and having attended 3 years at West and my final year at Winter, for the fourth year students only, I would suggest holding the first class on Sunday in place or in addition to home room. That way, after graduation, the fourth year students don't need to attend a class on Thursday after they've already graduated.
- I loved it. I am also considering fast tracking but realize I may lose valuable time/opportunities with my class, so may ultimately not choose this option.
- For reference, the final two lunches were not very good. I think the choices made by IOM were fine, but the quality of the lunch served at the University was not.
- The rooms were too cold. I froze the entire time.
- I'd recommend that there is networking time for first-years before or during the first homeroom. Outside of introductions, we dove right in and it was difficult to get to know each other in the first day or two. I sat toward the front of the room during core classes so I developed a good relationship with those around me but I don't feel the same to those who sat in the back.
- It would be helpful to break the larger groups down to network by state and by the size of chamber or association. There may have been individuals there who don't live far from me but I would never have had the opportunity to meet or even know they were there. I think breaking down by size of chamber would be helpful because we probably face similar challenges and solutions, that larger or smaller chambers may not handle the same. Maybe this could be done as simply as putting signs on table during lunch or breaks and you could sit with the group?
- Overall, this is an outstanding program and site. I would like to see the regents more thoughtfully engage with the attendees. Same goes for the institute staff. The relationship building seemed lost this time. Reflecting over the past four years, this has been a remarkable experience and one that I will highly recommend to others at my chamber and in the industry. Very nice work.
- I have one request for future speakers. Nothing politically or racially connected where ones opinion is allowed to take the floor.
- One other thing - the campus was nice and it was a nice walk from/to the hotel - enjoyed this. No issues here. The homeroom class room for 4-2 was very cold on Monday which made the classes difficult. I enjoyed Tucson, but an expensive venue.
- LOVE LOVE This program! Keep up the great work!
- For Year 4, it might be nice to come in a few hours earlier on Sunday and have that last Core class and then have an easier time on that Thursday morning. We all had a hard time focusing on the class.
- Winter Institute was a great experience overall. I look forward to seeing everyone again in 2021!
- I keep going to Institute hoping it will get better but it just doesn't seem to be happening. On my flight home I was trying to determine the "take-aways" that I learned from Institute and wanted to start implementing at my Chamber and there weren't very many. I feel like we have a lot of the same faculty telling the exact same stories we heard last year and everything seems very basic. I don't want to be a Debbie Downer but it is a major investment of time and money and if I am going to be completely honest I get a lot of more out of our regional and even state conferences. Sorry!



ATTENDEE SURVEY RESULTS AND FEEDBACK

- I would like more opportunities to network with a purpose - such as roundtables at breaks/lunch to find other colleagues. I know my class well, but I can't tell you who else are 3rd years, or frankly know much about the other attendees that I didn't know prior to attending Institute. When many of the outside of classroom activities are driven more by socializing and drinking, it is difficult to network in a more meaningful way.
- Good program, like to see a more welcoming environment for fast trackers or people who hand to adjust to another year.
- You should re-consider Monday's schedule. The time difference and 3 content heavy classes, I missed my team dinner from fatigue. Consider pushing Thursday out longer would be an option, or add the extra class on a non-team dinner night.
- As a first year Chamber Exec the Institute was extremely helpful, the courses provided so much helpful information and the instructors were very knowledgeable. Our class instructor, [removed] was so upbeat, friendly and helpful. Can we keep her for our 2nd year Institute session? Breaks and lunch were excellent and much needed, and location was ideal for everyone to get to know all classes, not just our core class. I highly recommend Institute and hope to be back again next year!!
- This being my 2nd year, I had a better understanding about the courses I took, it can be overwhelming but very knowledgeable, I was able to take what I learned from my professors and classmates back to the Chamber, this has helped me to become a more professional and has developed me into a stronger person. Everything I have learned I will bring back to the Chamber, this will help me and my Chamber succeed that much more. I look forward to my 3rd year with the Institute. The people that I have met and relationships that have grown, this will be with me forever.
- The venue for our class was in the basement which had poor lighting, few outlets and was cold. Other than that everything was good. Hopefully next year our class can be somewhere a little more inviting.
- Thank you for organizing IOM. I enjoyed my time and training.
- One thing that I would improve upon is the location of our homeroom. I was in 2-1 and while I know we are a large class, the room we were in was COLD, DARK and basically a dungeon. To sit in a room like this for most of the hours of each day was VERY difficult. I brought my coat each day to try and stay warm. I am flying from a cold and dark midwest state in January to Tucson for a reason! We need some sun and fresh air please. With only a 30 minute break it was very difficult to get upstairs, through the food line and use the restroom within that 30 minutes, particularly because there were 60 of us. Thank you!
- The survey's were good for each class. Networking was great. Enjoyed the after hours events and glad there was coordination of things to do. Our class dinner was great too – [removed] from our class did a great job.
- Thank you for the opportunity to attend Institute. Only one slightly negative thing is the timing between classes and activities. I.e. scholarship run scheduled to start 20 minutes after classes were do to finish. We finished our class late and still had to get to the hotel/start as well as change. Was very tight turn around.
- With more experience in the Chamber now, some of my first year classes that were so overwhelming at the time would have been useful to somehow get a recap in my fourth year.



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ATTENDEE SURVEY RESULTS AND FEEDBACK

- My only suggestion would be to avoid using the basement room for core classes if possible. I understand space can be limited but it wasn't the most conducive room for learning. We also seemed to be short on tables and some attendees sat in chairs without a table to take notes on in the back row. Overall, our 2nd year class advisor was incredibly accommodating and worked diligently to meet everyone's needs. Major kuddos to [removed].
- Fantastic instructors for the most part.
- It would have been helpful if all the presentation slide decks had been numbered.
- 2020 Winter Institute was great overall save from that one experience. My one dread was that it was going to be a marathon like the first year but I felt the classes were way more substantive and ended up making the week fly by. It's probably because the first year classes are more "101" in nature. Can't wait for 2021!
- I hope to return sometime. It was a very enriching experience.
- The teachers were of a greater caliber this year...and the ones I struggled with last year improved. I left feeling inspired and with a long list of to-dos. Thank you!
- I am in class 2-1. I know some of my classmates have different views - but this class is too big. I don't feel like I get the full Institute experience in a class of 56. I blend in and don't know 2/3 of my classmates.
- A later start time would be beneficial (half hour or otherwise). Overall, great experience I am glad I did it and very appreciative of the considerations given to WACE Academy grads and integrating those into the program.
- This year's Institute was amazing! I feel that I got something from all of the classes. I can't wait to attend next year!
- I am fast tracking so this was the third group I have been with. From the moment that the 5 "fast trackers" joined the group on Sunday we were not made to feel welcome. Our class adviser kept calling us "Fast Trackers" and the rest of the group took on her attitude. I finally mentioned that I had loved fast tracking because my network of friends and classmates was double and now triple. I have a huge pool of friends that I can call on to ask questions or get advice from so it has been a blessing to me. I just did not LOVE the curriculum this year. So much of it was common sense and many times I kept thinking, how do people not know this? Every class needs to have a [removed] as a teacher-- one that motivates and gets you excited about what we do everyday.
- Very pleased with this site- I am fast tracking and have heard all positive things about this campus, all true!
- I would say please, please make sure that the speakers you have are tailoring what they say to meet ACCE standards. I mentioned it in our class survey, but [removed] - while perfect for the Monetizing Events class, may not have been the best choice for Revving your Revenue stream or whatever he taught to class 1. My colleague was in year 1 and was appalled at the fact that when asked about how they tracked retention, said "I'm not sure if its right or wrong but we don't track retention. We don't care about our retention rate. All we care about is revenue." That's not a good thing to say - especially to a year 1 class.



WINTER

ATTENDEE SURVEY RESULTS AND FEEDBACK

- I enjoyed being back on campus. Being at the Marriott last year was close to torture. The networking with peers and mentors is an invaluable benefit of this program.
- Please improve the banquet. Maybe ask some of your rock star speakers that excel at this to help.
- Of my eight classes, six were good or very good, one was fair and one was horrible. So that's a pretty good average. I suggest that the curriculum committee review each instructor's full PPT in advance. Instructors should not be allowed to go around the room and ask "What do you hope to learn from this class," it's just a time-filler. They also should not be allowed to recommend we do a SWOT analysis, all of us are very familiar with this concept. Not sure why there was only one bar open at the Big Bash, the line was very, very long. As a fourth year, I would rather go to class on Sunday night so that we are done with classes at graduation. Then maybe we could meet up for an hour on Thursday to have breakfast, debrief and say our goodbyes. The Marriott was kind of a mess, but that is not the fault of Institute, the hotel is very well-situated. Despite some issues, overall it was a very good conference with lots of good information. I am glad I got to attend and honored to have earned my IOM certificate.
- It would be nice to have a clear indication of which electives are created for chamber OR association professionals. If we knew the speaker and their background, that could also help drive the decision as to which elective to attend.