

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

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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

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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

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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

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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