



Consent Agenda-Winter Chairman's Report

Submitted By: Lynn Olberding, IOM, CCE

1. **What is your board's attendance goal?** Provided by staff, our goal is 201 overall attendees, with 81 first-years.
2. **What have you been doing/will continue to do to focus on marketing and recruitment for next year's program? (i.e. weekly "homework" assignments, call/email lists, recruitment by state, etc.)** As our registration just launched recently, we have been focused on promoting registration through our channels (e.g. individual outreach to those we know in the program, through state associations, etc.). Later this fall, board members will be asked to reach out to those on the ABNYR (attended, but not yet registered) list.
3. **What other strategic goals does your board have?** Our goals include raising \$10,000 for scholarships; providing all-star customer service and tying benchmarks to future survey responses; and continuing to have broad representation (demographic, geographic, size of chamber/association, etc.) on the Board of Regents.
4. **How, if at all, has your board utilized social media throughout the year and on-site, and what are your future plans regarding social media?** We are working on a social media strategy for both pre-site and on-site at Winter Institute.
5. **Is there anything specific you think Institute should focus on in this new, post-pandemic world?** Institute should ensure that the content remains relevant to our changing workforce and memberships.
6. **Is there anything additional you want the Board of Trustees to address regarding Winter Institute?** Not that I can think of, thanks!



Consent Agenda-Midwest Chairman's Report

Submitted By: Angie Whitcomb, IOM

- 1. What were your final enrollment numbers and how did they compare to your board's goals and expectations?** Our final numbers were 124 overall attendees, 56 of which were first-years. The goal was 157 overall with 46 first-years.
- 2. What was your biggest success?** We saw the most success and received the best feedback on the "personal touches" we poured into our Midwest attendees. The board was committed to making our re-entry into Madison a comfortable, reassuring, and welcoming one. We independently arranged a sponsor for a Kickoff Reception that was held on Sunday evening after Homeroom and Institute Kickoff. We offered heavy appetizers and cocktails and provided a place for everyone to either reconnect after several years apart or meet their new classmates for the first time. It was a HUGE success. It set the tone for the week and helped make the "first timers," whether first-year or fourth-year, feel welcomed in a new setting. We also held a private champagne toast for the fourth-year graduates. After the ceremony, we whisked them off to another room where they were greeted with a glass of champagne, a class photo opportunity, and a 'thank you and congratulations' toast from the board.
- 3. What was your biggest challenge?** What started out as a challenge quickly evolved into possibly the best part of the week. The board was very in tune with the fact that the second through fourth-year classes, for the first time in our board service, were not cohesive. We were worried that the "Midwest Energy" wouldn't return after being away for 2+ years and that would somehow lessen the impact of the week, especially for our graduates. But this group of 24, along with all their peers in the first through third-year classes, showed up in Madison from all over the country, from different Institute sites, and without a shared history of a class, uninterrupted. They bonded and gelled, and showed us all what perseverance and commitment look like, which is a true testament to the spirit of Institute and our profession.
- 4. What do you plan on doing to focus on marketing and recruitment for next year? (i.e. weekly "homework" assignments, call/email lists, recruitment by state, etc.)** Every member of class 1-1 received a personal invite from our incoming board chair to return to Madison for the rest of their IOM journey on the last day of class. As we enter budget season, we are planning on sending an email to all attendees to encourage them to budget for the program, and to remind them of the importance of making this investment in their professional development and their organization. As we get closer to summer registration opening, we will continue with our personal outreach from board members with important dates and personal touches.
- 5. How, if at all, has your board utilized social media throughout the year and on-site, and what are your future plans regarding social media?** We are not as strong in this area as we should be. We're grateful for staff social media and



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have been good about sharing and forwarding those messages. We are committed to making a social media plan for 2023 and beyond, and focusing on pre- and on-site engagement.

6. **Is there anything specific you think Institute should focus on in this new, post-pandemic world?** Focusing on what the new world looks like in terms of programming, non-dues revenue opportunities, and membership, in addition to focusing on chambers merging and moving to new regional models is key. Additionally, stressing the importance of interpersonal connections is important, and we need to get more focused on relationships and industry connections.
7. **Is there anything additional you want the Board of Trustees to address regarding Midwest Institute?** Nothing at this time!



Consent Agenda-Southeast Chairman's Report

Submitted By: Pammie Jimmar, IOM

1. **What were your final enrollment numbers and how did they compare to your board's goals and expectations?** Our final numbers were 225 overall attendees, 73 of which were first-years. The goal was 255 overall with 80 first-years.
2. **What was your biggest success?** Our biggest successes were the record number of industry consultations (40) and a profitable silent auction. We are also super proud of our Ambassador Program.
3. **What was your biggest challenge?** Our biggest challenge was offering the program during COVID, and not having an outbreak during the event.
4. **What do you plan on doing to focus on marketing and recruitment for next year? (i.e. weekly "homework" assignments, call/email lists, recruitment by state, etc.)** We will challenge the board to make several testimonial posts which include photos from previous years to share and tag on the social media platform(s) of their choosing. We will also continue to reach out to those who have yet to complete the program. Most of all, we will continue to recruit within our state chambers.
5. **How, if at all, has your board utilized social media throughout the year and on-site, and what are your future plans regarding social media?** It's so fun to see all of the posts of past, present, and future attendees engaging in social media. We plan to create a final countdown post to the day we return to Athens. Additionally, all board members do a great job of posting and sharing videos while on-site, which is always a powerful marketing tool.
6. **Is there anything specific you think Institute should focus on in this new, post-pandemic world?** I love how Institute has adopted using Facebook Live during Graduation since we no longer have the Big Bash. This is an added bonus for everyone to be able to watch the fourth-years graduate.
7. **Is there anything additional you want the Board of Trustees to address regarding Southeast Institute?** The Southeast site is awesome. We love it, and the amazing Institute staff that makes it an incredible experience for all attending.



Consent Agenda-Northeast Chairman's Report

Submitted By: Douglas O'Flaherty, IOM

1. **What were your final enrollment numbers and how did they compare to your board's goals and expectations?** Our final numbers were 131 overall attendees, 53 of which were first-years. The goal was 138 overall with 37 first-years.
2. **What was your biggest success?** Our biggest success was managing the things we forgot and remembering how to be on-site after two years off. We had a smaller team of regents on-site this year and each member of the board stepped up and answered the call and did an outstanding job to deliver an exceptional experience for the attendees.
3. **What was your biggest challenge?** Our biggest challenge was finding a comfortable location for our attendees (the room temperatures were either frigid or sweltering, which was problematic) and finding comfortable rooms for the larger class sizes.
4. **What do you plan on doing to focus on marketing and recruitment for next year? (i.e. weekly "homework" assignments, call/email lists, recruitment by state, etc.)** We are of course open to new ideas, but the tried and true personal outreach has been a very successful strategy thus far and we plan to continue that approach while brainstorming others.
5. **How, if at all, has your board utilized social media throughout the year and on-site, and what are your future plans regarding social media?** The board is very comfortable with social media and have, and will continue, to post, repost, share, and hashtag. Susan Spears designed social media t-shirts with a large screen-print with "@ or # IOMeducates" that board members wore on different days throughout the week.
6. **Is there anything specific you think Institute should focus on in this new, post-pandemic world?** Presentation skills – How do you show up, in person and virtually, to make members comfortable and the organization proud?
7. **Is there anything additional you want the Board of Trustees to address regarding Northeast Institute?** The new campus upscale restaurant and dormitories was a pleasant addition. Conversely, the ongoing construction and renovation of Bartley Hall every summer is consistently disruptive.