



2022 Fall Board Meeting: Winter Board of Regents

Agenda

October 25, 2022

10:15 a.m. – 12:00 p.m. EDT

U.S. Chamber of Commerce
 Washington, D.C.

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| I. | Welcome and Roll Call | Lynn Olberding, IOM, CCE |
| II. | Approval of Minutes – September 7, 2022 Meeting | Lynn Olberding, IOM, CCE |
| III. | Staff Update | Institute Staff |
| IV. | 2023 Winter Institute | Board Members/Institute Staff |
| | - Review of Strategic Goals | |
| | <ul style="list-style-type: none"> • Recruit 201 attendees, including 81 first-years. • Raise \$10,000 for scholarships. • Provide all-star customer service and tie benchmarks to future survey responses. | |
| | - <i>Include discussion on intentionality and on-site regent engagement.</i> | |
| | - Class Advisor/Regent Partner Discussion | Josh Driskell, IOM |
| | - Discussion of the Week/Regent Responsibilities | |
| | <ul style="list-style-type: none"> • Class Advisors: Josh Driskell • Fundraising: Adrian Cain, Duffy MacKay • Industry Consultations: Chris Romer, Kara Beer • Scholarships: Dexter Freeman, Lynn Olberding, Erin Carter • Pre-Institute Mixer: Rudy Flores • Opening Welcome: Rudy Flores, Adrian Cain, Erin Carter, Dexter Freeman • Association Event: Mike Johnson, Duffy MacKay • Fourth-Year Recognition: Kathi Roetter • Volunteer and Faculty Dinner: Erin Carter, Meredith Rivers • Social Media Strategy: Josh Driskell, Rudy Flores • Ambassador Program: Erin Carter, Kara Beer, Kathi Roetter • Absence Response Manager: Dexter Freeman • Group Consultations/Lunch Table Topics: • Class Dinners: | |
| V. | Additional Business and Adjournment | Lynn Olberding, IOM, CCE |

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



Winter Board of Regents Meeting

Agenda

September 7, 2022

3:30 p.m. EDT

In attendance: Lynn Olberding, IOM, CCE; Josh Driskell, IOM; Erin Carter, IOM; Kara Beer, IOM; Adrian Cain, IOM, CCE; Rudy Flores, IOM; Dexter Freeman, IOM, MBA; Mike Johnson, IOM; Duffy MacKay, IOM, N.D.; Meredith Rivers, IOM; Kathi Roetter, IOM; Chris Romer, IOM, ACE; Karyn K. MacRae, IOM, CAE, CMP; Cecilly Francisco; Isabel Stone; Nathan D. Graham

I. **Welcome and Roll Call**

Lynn Olberding, IOM, CCE welcomed everyone to the meeting and attendance was taken.

II. **Approval of Minutes**

Minutes from the May 23, 2022 meeting were approved with no changes.

III. **Staff Update**

Staff shared that registration will launch as soon as final logistics have been confirmed with the university, hopefully within the next week and a half. Regents learned that they will receive enrollment goals and projections shortly. It was also reported that improvements were being made to the registration system and app to make for a better user experience for attendees and volunteers. Lastly, staff shared that in accordance with the latest federal and CDC guidance, the U.S. Chamber is no longer requiring vaccine attestation at events.

IV. **2023 Winter Institute**

The goals below were reviewed.

- Recruit attendees to meet the goals set by Institute staff (will be provided soon).
- Raise \$10,000 for scholarships.
- Provide all-star customer service and tie benchmarks to future survey responses.

Regents reviewed assignments, shared updates, and discussed logistics appropriately.

- **Class Advisors** – Josh Driskell
The interest survey (application) will be sent to those included in the pool of volunteers. Regents should share any additional recommendations with Josh.
- **Fundraising** – Adrian Cain, Duffy MacKay
The fundraising committee will have a call offline to discuss details for the auction and additional potential fundraising opportunities.
- **Industry Consultations** – Chris Romer, Kara Beer
Staff will look into the possibility of hosting consultations through the registration system/app.



Winter Board of Regents Meeting

- **Scholarships** – Dexter Freeman, Lynn Olberding, Erin Carter
The committee was thanked for their hard work, especially for the quick turnaround in awarding the funds. All applicants will be notified prior to registration launching.
- **Pre-Institute Event** – Rudy Flores
The Moonstone at the Graduate Hotel no longer offers semi-private parties for small groups, but Rudy will reach out to confirm. He will work on finding alternate locations as well.
- **Opening Welcome** – Rudy Flores, Adrian Cain, Erin Carter, Dexter Freeman
There was much discussion on both the speaking portion of this event, as well as a potential post-Kickoff reception. Ideas for changing the speaking portion include providing a short faculty welcome/keynote (this was done at all summer sites), shortening the volunteer introductions, and playing a slideshow with volunteer headshots and pictures from the classroom. Institute can host a brief networking reception, however alcohol will not be provided. Regents want to be intentional with how they present themselves and interact with attendees. More discussion on on-site engagement will take place in the coming months.
- **Association Event** – Mike Johnson, Duffy MacKay
This event will follow previous year's formats.
- **Fourth-Year Recognition** – Kathi Roetter
The graduate recognition breakfast will once again take place, with the opportunity to change the format, if desired. Staff will work with the committee on details.
- **Volunteer/Faculty/Staff Dinner** – Erin Carter, Meredith Rivers
While The Dutch (previous dinner location) has moved, the group agrees that choosing a location within walking distance to the hotel is key, especially for faculty participation.
- **Social Media Strategy** – Josh Driskell, Rudy Flores
The committee will work with staff in supporting Institute's official social media strategies. Regents recognized the improvements made on social media in the recent months.
- **Ambassador Program** – Erin Carter, Kara Beer, Kathi Roetter
The committee will discuss more on this offline.
- **Absence Response Manager** – Dexter Freeman
- **Group Consultations/Networking** –
The idea of lunch table discussions and/or group consultations during breaks were discussed.
- **Class Dinners** –
A suggestion was made for regents to play a larger role in the planning of the class dinners, specifically running point on making reservations.



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Winter Board of Regents Meeting

V. Other Business/Adjournment

The next meeting will be the Fall Board Meeting in-person at USCC Headquarters on Monday, October 24 and Tuesday, October 25. Registration for the meeting will go out shortly after Winter registration launches.

There being no other business, the meeting was adjourned.

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



2023 Winter Institute

Please note this schedule is tentative and subject to change.

Wednesday, January 4

11:30 a.m.–1:30 p.m.	Board of Regents and Class Advisor Briefing: Tucson Marriott University Park
2:30 p.m.–4:00 p.m.	Registration: Tucson Marriott University Park, Lobby Level
3:30 p.m.–4:00 p.m.	Graduation Rehearsal (4 th years only): TBD
3:30 p.m.–4:00 p.m.	Walking Tour: Tucson Marriott University Park, Lobby
4:00 p.m.–4:45 p.m.	Homeroom: Student Union Memorial Center, Individual Rooms
5:00 p.m.–6:30 p.m.	Institute Kickoff: Student Union Memorial Center, Gallagher Theater

Thursday, January 5

7:00 a.m.–8:00 a.m.	Registration: Student Union Memorial Center, Staff Office, Madera
8:00 a.m.–11:30 a.m.	Core Classes: Student Union Memorial Center, Individual Rooms (Break: 9:30–10:00 a.m.)
11:30 a.m.–12:30 p.m.	Lunch: Student Union Memorial Center, Grand Ballroom
12:30 p.m.–4:00 p.m.	Core Classes: Student Union Memorial Center, Individual Rooms (Break: 2:00–2:30 p.m.)
1:30 p.m.–2:00 p.m.	Class Advisor Meeting: Student Union Memorial Center, Regent Office, Picacho
4:15 p.m.–6:15 p.m.	Elective Classes: Student Union Memorial Center, Individual Rooms
Evening	Class Dinners: On Your Own

Friday, January 6

8:00 a.m.–10:00 a.m.	Elective Classes: Student Union Memorial Center, Individual Rooms
10:00 a.m.–10:30 a.m.	Break: Student Union Memorial Center, Grand Ballroom
10:30 a.m.–12:30 p.m.	Elective Classes: Student Union Memorial Center, Individual Rooms
11:00 a.m.–11:30 a.m.	Board of Regents Meeting: Student Union Memorial Center, Regent Office, Picacho
12:30 p.m.–1:30 p.m.	Lunch: Student Union Memorial Center, Grand Ballroom
1:30 p.m.–5:00 p.m.	Core Classes: Student Union Memorial Center, Individual Rooms (Break: 3:00–3:30 p.m.)
2:00 p.m.–2:30 p.m.	Class Advisor Meeting: Student Union Memorial Center, Regent Office, Picacho
6:00 p.m.	Association Mixer: TBD
Evening	Faculty and Volunteer Dinner

Saturday, January 7



2023 Winter Institute

Please note this schedule is tentative and subject to change.

8:00 a.m.–11:30 a.m.	Core Classes: Student Union Memorial Center, Individual Rooms (Break: 9:30–10:00 a.m.)
9:00 a.m.–9:30 a.m.	Class Advisor Meeting: Student Union Memorial Center, Regent Office, Picacho
11:30 a.m.–12:30 p.m.	Lunch: Student Union Memorial Center, Grand Ballroom
12:30 p.m.–4:00 p.m.	Core Classes: Student Union Memorial Center, Individual Rooms (Break: 2:00–2:30 p.m.)
6:30 p.m.	Graduation Ceremony: Tucson Marriott University Park, Ballroom

Sunday, January 8

Morning	Fourth-Year Breakfast
8:00 a.m.–11:30 a.m.	Core Classes: Student Union Memorial Center, Individual Rooms (Break: 9:30–10:00 a.m.)
9:00 a.m.–9:30 a.m.	Class Advisor Meeting: Student Union Memorial Center, Regent Office, Picacho
10:00 a.m.–10:30 a.m.	Board of Regents Meeting: Student Union Memorial Center, Regent Office, Picacho
11:30 a.m.	2023 Winter Institute Concludes



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Class Advisor Roster-2023 Winter

TBA



2022 Winter Geographic Breakdown

State	Total	% of Total	State	Total	% of Total
Alabama	0	0.0%	Missouri	6	3.0%
Alaska	5	2.5%	Moldova	0	0.0%
Arizona	4	2.0%	Montana	2	1.0%
Arkansas	14	7.0%	Nebraska	3	1.5%
Armenia	0	0.0%	Nevada	0	0.0%
Azerbaijan	0	0.0%	New Hampshire	1	0.5%
California	6	3.0%	New Jersey	1	0.5%
Colorado	7	3.5%	New Mexico	2	1.0%
Connecticut	0	0.0%	New York	1	0.5%
Delaware	0	0.0%	North Carolina	2	1.0%
District of Columbia	15	7.5%	North Dakota	0	0.0%
Florida	1	0.5%	Ohio	7	3.5%
The Republic of Georgia	0	0.0%	Oklahoma	6	3.0%
Georgia	2	1.0%	Oregon	2	1.0%
Hawaii	0	0.0%	Pennsylvania	5	2.5%
Idaho	4	2.0%	Rhode Island	0	0.0%
Illinois	5	2.5%	South Carolina	0	0.0%
Indiana	4	2.0%	South Dakota	3	1.5%
Iowa	8	4.0%	Tennessee	1	0.5%
Kansas	4	2.0%	Texas	21	10.4%
Kentucky	2	1.0%	Utah	0	0.0%
Louisiana	4	2.0%	Vermont	0	0.0%
Maine	1	0.5%	Virginia	6	3.0%
Maryland	2	1.0%	Washington	7	3.5%
Massachusetts	1	0.5%	West Virginia	0	0.0%
Michigan	12	6.0%	Wisconsin	6	3.0%
Minnesota	11	5.5%	Wyoming	7	3.5%
Mississippi	0	0.0%	Total	201	100.0%

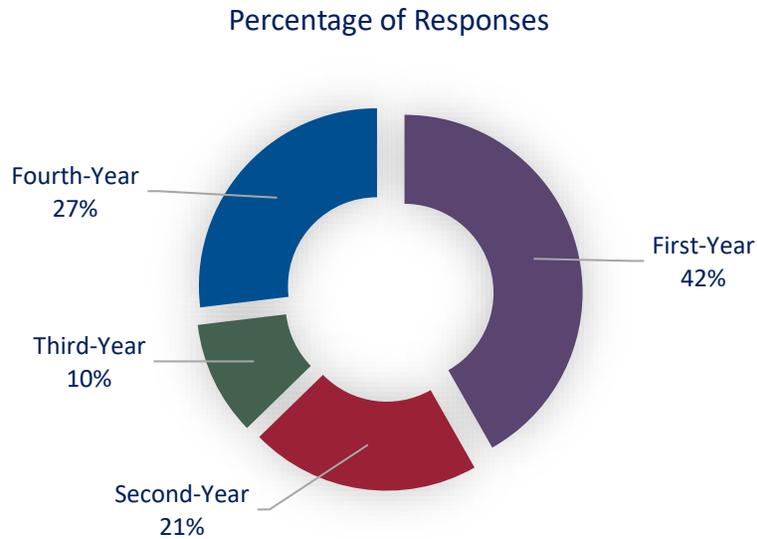
Most Represented States/Territories:

- Texas
- The District of Columbia
- Arkansas
- Michigan
- Minnesota



2022 Winter Attendee Survey Results

Q1: Class Year



Q2: What was the key factor(s) in your decision to attend Institute?



*Attendee comments are listed as written and are not edited for grammar. *



2022 Winter Attendee Survey Results

Q3: Please provide comments on customer service (Institute staff, Board of Regents, Class Advisors, university staff, hotel staff)

- Class advisor and staff were all fantastic. I couldn't have asked for better.
- Excellent
- Institute staff, Board of Regents, Class Advisors, and University Staff were outstanding!
- Staff and volunteer regents were responsive. (removed) is a great personality for the task, but he dropped the ball on the class dinner, one of the students stepped in, and eventually (removed) stepped up, but it would have been easier if (removed) took the lead. The AV problems and delays were avoidable and unacceptable often cutting into valuable instruction time.
- "Everything was great! This was the best educational experience I have had in my 16-year career!
- If I had to pick one thing to change, it would be the food offered at the lunches... fortunately the food on breaks was good. :) "
- top notch, encouraging and helpful. they care and that shows.
- great
- As a first year the information leading up to WI was overwhelming. The class structure was confusing, and it wasn't really clear which class options would be best when choosing your classes. Advisors did a good job of answering questions as the conference began.
- Institute staff are top notch. Please bring back (removed) and (removed)! Our class advisor, (removed) was AMAZING. Can he stick with us for the next few years? The site is great. It would be wonderful if the Graduate would offer IOM rates as many of us had difficulties with the Marriott.
- All the staff was excellent and helpful.
- The institute staff, board, class advisors and everyone associated with U.S. Chamber were excellent, helpful, engaging and understanding. The level of service from the University could be better. It didn't seem up to par with an event of this nature.
- All were great!
- Institute Staff, Board of Regents, and Class Advisors were great. Hotel Staff were good; however, there's a few issues i.e., cold showers that needs to be addressed. First world problem.
- Everyone did a fabulous job communicating and making sure that we all had a wonderful experience.
- Everyone was wonderful!
- Everyone was friendly, knowledgeable, and helpful.
- Wonderful! Everyone was very welcoming, kind, and helpful.
- "(removed) was a fantastic class advisor for 1:1!! His communication started weeks before Institute and stayed pretty consistent. I plan on staying in touch with him since our chambers are somewhat similar in size and complexities.
- I was surprised by the lack of communication from the Board on Omicron. Coming from MA, it was surging when I left for Tucson so I wasn't even sure I could make it (be sick myself) and should make it. I was even wondering if Winter Institute was going to shut down last minute before arrival date. The few emails from the Board did not mention what to do about Covid (other than all of us signing attestations) as we gather; is there testing onsite; etc. I get no one, especially the IOM

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2022 Winter Attendee Survey Results

planners, want to talk about Covid but having continuing acknowledgement and guidance in every communication would be helpful for all.

- I was very impressed with all of the class advisors, IOM staff, and the Board of Regents and the faculty! Top notch and all delivered with enthusiasm and energy!!
- Lastly, I stayed at The Graduate and loved it!"
- The Board of Regents were AWESOME - incredibly welcoming.
- 5 stars all around! I had heard good things, but IOM blew my expectations out of the water! I heard the other first year class had a Facebook group established ahead of time - I like that idea.
- Excellent customer service throughout the conference, (removed) was a great class advisor.
- The Institute staff and class advisor were great. The university staff seemed very accessible to help with tech issues. The food and beverages provided for lunch and snacks were a nice change from typical chamber chicken. I appreciated the variety.
- The map of campus was a little confusing for first timers. I would have been lost as a goose if I didn't catch up with my advisor at the first session.
- Everyone was welcoming, friendly and very helpful!
- Everyone was very friendly, especially IOM Staff

(End of First-Year Comments)

- Fantastic! Class Advisors - (removed) & (removed) were SO great!
- Always felt well informed. Class Advisors were great!
- The 2-1 Class Advisors were great and did a tremendous job with providing information leading up to Institute and during the week. The staff at U of A were great, especially the IT. They did a great job anytime there was an issue with a classroom I was in.
- Everyone was helpful, professional and friendly! I was sad that they ran out of some of the food for our Thursday lunch and the chicken was yucky.
- Our Class Advisors were amazing! They scheduled three dinners for the class to meet as a group off-site. They were friendly and easy to talk to.
- Probably already aware but the food and snacks were all horrible. As industry leaders who all do events, I am not sure who signed off on this and thought it was appropriate to serve the food that was done. Institute should be leading the example not the case study on what not to do. Second, it sounds like there are challenges with food meeting rooms etc. on campus. Does it make sense to move it to another campus in California, Phoenix, Texas? I think there are a lot of great places/venues that would roll out the red carpet to host Institute and the perception from staff is the university does not want us there or are challenging to deal with.
- Institute Staff we're fabulous. Very responsive to questions. Hotel staff courteous and professional.
- Great experience! So glad you moved forward with hosting. I was worried it was going to be cancelled. Class advisors were great. Food was good - would like more protein options.
- It was evident that US Chamber/IOM is understaffed, and many must be new right now. Was really hard to get good information, questions answered, and registration was clunky this year. Also, a lot harder to get full event timelines, especially in time to make flights. I like coming early for pre-event mixers and networking opportunities, but all that was left off the website. I didn't find out until much later, when our class advisors reached out. Our class advisors were amazing at

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2022 Winter Attendee Survey Results

communication and Board of Regents did a great job! THE UNIVERSITY STAFF were the stars of the show (IT and food caterers). They were so kind and helpful, really appreciated food with allergens listed at every meal or snack. If not out (think only one time), they always had an additional option for you in the back. I know everyone is down now, and it was just cool to see how dedicated the service was for us.

- A+ across the board... Regents, staff and advisors. My limited interaction with university staff was all positive. I stayed at the Graduate as the room block was full, and my stay there was very good.
- Excellent!
- The staff of Institute are fantastic! Also available to answer questions and were very helpful and caring...especially on all those dang flight delays and cancellations!

(End of Second Year Comments)

- Institute staff, board and class advisors were good. Hotel had some technical computer problems during everyone checking in that created some issues, but hotel staff was polite and as helpful as they could be.
- Everyone was very friendly and helpful!
- I had no hot water in my hotel room - due to the actual knob, not the hot water heater, and I had to go to the hotel staff 4 times before they changed me rooms. I didn't have a connection with Institute staff, Board of Regents or my class advisor.
- Institute Staff/Volunteers are ALWAYS helpful, and you can truly feel they want to help us have a great educational experience. Hotel staff customer service was great, given the many issues they ran into during our stay (check-in system offline when many of us arrived, for example).
- Customer service was great. They were dealt a tough hand with Covid protocols, and they were all great.
- Customer service was great across the board. Everyone was welcoming and helpful.
- "I have no specific comments because everything was great.
- An aside, I understand how challenging it must have been to manage safety precautions in the midst of COVID-19. We're all adults, and while some expectations were set by IOM, I don't feel that all of those expectations were met by attendees. I'm not sure what could have been done differently, but some of the choices made by my classmates were unfavorable (ex: showing up to class unmasked despite being actively symptomatic, rumors about lying on the attestation forms, etc.) I am disappointed as these actions impacted my experience and ability to feel safe and concentrate in class."

(End of Third Year Comments)

- All did a great job.
- "Everyone was really nice and helpful.
- I didn't really like the lunches that were provided. They were too fancy - I know that sounds weird, but I wasn't expecting Indian food and all that. I figured something light like soup and sandwich or a salad. It was just too much and not very good.
- Another thing I would like to mention is the fact that the tables were never cleaned off in the banquet room. They were dirty with crumbs and junk all over them. If everyone was so concerned about health and safety, why weren't the tables sanitized?"
- (removed) was an incredible class advisor. Please note, at the bottom, I indicate I would recommend IOM, but not at this site. That has nothing to do with the people, who were all outstanding. I am not fond of the setup at U of A, from the food

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2022 Winter Attendee Survey Results

to the hotel to the Student Union. I have attended at three different sites, and my order would be 1) Madison 2) Athens 3) Tucson.

- All around excellent
- Institute Staff, Board of Regents, Class Advisors and University Staff were all great! The hotel stall customer service was lacking a bit.
- (removed) was amazing. He went above and beyond as a class advisory. He kept us informed, utilized an app for communication, and set up class events for most every meeting.
- The Institute staff is always awesome. I can't believe they pulled it off with only 3 people. The Board at Winter was great. The hotel staff did good as well. I know they were short staffed at breakfast but got this corrected after day one. One thing Midwest does is high-five everyone on the last day on their way out. Missed that. Is a nice closure to the week.
- Everyone was great! University staff was nice but see my comments in the last section.
- I thought customer service was exceptional this year, as it has been in the past.
- Everyone on the Institute staff and Board of Regents were incredibly helpful all four years, but this year especially considering the challenges of COVID. (removed), (removed), (removed), and (removed) were all amazing Class Advisors the past four years. (removed) went above and beyond! The hotel staff was friendly and accommodating.
- Very professional run program and the staff, regents, advisors were all welcoming. The hotel staff were very professional and helpful.
- The Class Advisor was phenomenal as she had to deal with a graduating class that was comprised of several different years/locations, etc. It was not a cohesive group as each cliche did their own thing not only for class night but for graduation night. The Board of Regents was good. I would have liked to see them interact with the classes more during breaks and lunches. The hotel staff at the Marriot were very accommodating. The university lunches were not very good. Also, the tables were not cleaned properly. Having the classes go over the weekend took out many options for alternative food at lunch. One thought on mask requirement...I saw many of the board of regents with IOM masks. That might be a great thing to add into the swag bag for upcoming conferences.
- I thought everyone did a great job this year with customer service.
- Our class advisor was the best.
- The Institute staff was extremely professional and went above and beyond to make the experience very rewarding.
- They were always willing to help!!!
- The entire process seems to always run seamlessly. Thank you for all the pre-work that makes it so!

(End of Fourth Year Comments)

Q4: Please provide comments on events and additional programming (Kickoff, Graduation, Industry Consultations, Association Mixer, etc.)

- Since there are so few association people at the Winter Institute, I was really glad there was an Association Mixer. It made it so much easier to identify my association peers.

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2022 Winter Attendee Survey Results

- We were not notified of the opportunity for industry consultations until halfway through the program. Even then, there was not a lot of information as to what, when how. This is an opportunity that I would have likely taken advantage of if I had been notified in advance or given a little more context.
- The kickoff, graduation, industry consultation, and all classes were spectacular.
- Too late for the Mixer. GRRR. Other events were fun.
- Really great!
- all very nice.
- It would have been more beneficial to have the class dinner on night one. The kick-off did not feel like the best use of that time. I would rather have had a full class on afternoon 1 rather than a class on Sunday morning. The Sunday morning class was challenging to stay engaged as travel was on most people's minds, including the speaker. It also would have been beneficial to have a reception with the graduation. I formalized opportunity to mingle with other classes would have been preferred. I heard that providing alcohol was stumbling block to the reception. A cash bar would be just fine, just something where the graduating class is celebrated, and the mingling of all classes together would be appreciated.
- As Chambers and Associations needing to lead their communities by example, it was disappointing to see the amount of disregard for COVID. Masks were worn for the most part, but the after-hours events were crowded and lacked responsibility.
- I did not go to any of the mixers but would have, had I forged relationships the first day. I heard that there used to be a graduation celebration - it was missed this year (or so I heard). The mixers would be better if there were Regents or advisors helping to bridge connections and conversations!
- Everything was great - location was great (chairs in classrooms were uncomfortable) - it was nice to have other food options available and close by.
- The additional programming was helpful, well-planned and enjoyable. It was helpful and hospitable to have options for additional events like the mixer, especially being year one and being a non-chamber entity.
- Next year, I'll definitely arrive earlier to participate in the kickoff! Industry consultations were good. It would be nice if this was something that could be integrated into the app, so everything is a one stop shop!
- I did not attend the Industry Consultations because I was unsure who I should request for the information I needed. Maybe next year, you could have a list of potential topics of discussion next to each of the experts. If this was listed somewhere this year, I missed it, but I do hope to utilize that option next year.
- I need to take advantage of industry consultations in year two. I understand why there couldn't be a large post-graduation reception, but I would love to see that return to meet others outside of my class.
- I think it would have been nice to have events like the kick-off or the mixer integrated into the city so we could see a little more of it. Maybe a cocktail hour with heavy appetizers at one of the museums with the ability to walk around and a presentation from some of the local chefs since Tucson was just designated as a UNESCO World Heritage Site of Gastronomy? This would give people a chance to mix, to enjoy a little about the local city & culture and see some of the local businesses highlighted.
- It would have been nice to have the coffee and breakfast before our 8am classes instead of at the 10:30 break. Many of the coffee shops, besides the one in the hotel that was very slow, didn't open until 8am. Plus, the timing meant food was served at 10:30 and then lunch was served at 11:30 or 12:30, depending on the day.
- Finally, it would be great to have a non-dairy milk alternative for the coffee. Maybe oat milk, so many people have nut allergies in addition to being lactose-intolerant."

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2022 Winter Attendee Survey Results

- Our class dinner ended up being significantly higher in price than originally planned. Something more organized by the IOM team would have been nice to avoid surprise costs. I really enjoyed the entire experience overall.
- "Because of Covid, I stayed away from larger gatherings after class like the mixers. I truly wanted to be able to finish the first-year program and not get sick during it!
- I attended the Graduation and loved it. So great to recognize the 4th Years and the speeches were fantastic!
- I scheduled a 1:1 consultation with (removed) on 501c3 Foundations as we are re-launching ours this year. He gave me nearly a half hour and lots to think about and take back to my team. "
- I requested two industry consultations, but only was reached out to about one. Which is fine, someone else had told me to submit multiple ones - maybe some better communication around that. I also didn't learn about the industry consultations from our class advisor until day...3 maybe?
- I would have enjoyed a window of time during the day for a group activity outside of the classroom (group hike or an attraction specific to Tucson), especially for year one students.
- I felt a little under prepared for the graduation, perhaps a little more correspondence or reminders about this event prior to arriving on location. Class dinner was fun and helped build relationships beyond the classroom.
- Graduation was a little long. Also, going through to Sunday made it very hard to go to work the next week. It was tons of great information, I would just like a little time to process and decompress before starting a work week.
- I felt everything was good, no suggestions at this time.
- Class dinner was a little expensive and the food was skimpy. However, that was unpredictable.

(End of First Year Comments)

- Industry consultations are always valuable!
- Graduation was good. I have experienced it both as a sit-down dinner, and then this year as a presentation. I enjoyed the presentation only version more.
- N/A
- Kickoff- This was a great opportunity to network with class participants. This truly set the tone for the entire week at Institute!
- While we understand there are basic core things every person should know I wish we could customize core classes more or divide a marketing class into shorter separate classes such as video, advertising, podcasts, social media and let people choose certain things to go into. I think the marketing class was difficult to cover so many topics that individuals wanted fewer more specific examples of how to start a podcast, how to do impact videos, act.
- Association mixer was a great idea, graduation... like the idea of no banquet and just honoring graduates.
- Liked the Sunday-Thursdays scheduled better. Hate losing a whole weekend. Wish there was a dinner with graduation.
- Appreciate the advisors and regents being so good to plan after class mixers, so nice especially for people who don't know anyone. I know this isn't an opinion shared by some, but I would like to see an expo/vendor experience at IOM. Would be a great revenue stream and be helpful to get to talk to vendor reps about products.
- It would be nice not to have the class dinner on the 1st long day of IOM
- Wish there was the graduation dinner all together. I really missed that and being with everyone!

(End of Second Year Comments)

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- Some things seemed a bit chaotic/disorganized, especially at the beginning, but there were a variety of circumstances that contributed to this. As I was attempting to social distance myself whenever possible, I did not attend the association mixer, nor any class dinners. Graduation was good and kept on time. Slightly frustrating that we were not able to bring drinks into the ballroom??? Still unsure why that was an issue. And, as we all know, the food at the university was not good...
- The kickoff was nice. Graduation was really great. Can't wait to get back to those with the dinner, it really makes a difference when all the classes are there.
- Very sad regarding no Big Bash Graduation and feel they need to bring that back. I was told there will not be another one, even if COVID goes away totally. I believe tuition should be lowered if cost was a factor.
- The graduation ceremony was well done given the changes, though I felt we lost a big piece of the event with no post-graduation bash. The bash served as a celebration for all of us getting through the week and was our chance to meet and network with individuals from other class-years. It also served as a great celebration for the graduates, which they deserve. Having no post-week formal celebration made the week feel like it was lacking in substance apart from the classroom, which is just as important for professional development.
- I'm not a fan of graduation not being a full-on bash with dinner, drinks, etc. I think adds to the celebration of those graduates.
- "I have feedback on Graduation and one idea to apply to industry consultations. I actually didn't mind the move to forego dinner as a large group. However, graduation is one of the only times we are all together as one unit, so providing an avenue for networking would be an improvement for next year. This could be in the form of a cocktail hour, where attendees can purchase a drink and mingle with other attendees prior to the ceremony.
- My suggestion for industry consultations is this - have you ever considered offering IOM attendees the ability to request an industry consultation by Zoom between our annual IOM site visits? I would love to take better advantage of this benefit (I have only participated 1/3 years) but it is kind of hectic to squeeze in while we are there. I also struggle as to what topic to dig into. I often get back from IOM, catch up on all the work I missed, eventually pull out my notes to review and read and think to myself how I wished I would have thought to ask about this or that. It's usually a few months after we get back that we need specific help or advice and could use the personalized guidance. I think that the Virtual Training Sessions IOM put on these past few years have been fantastic and I think a virtual industry consultation would be equally as rewarding. "

(End of Third Year Comments)

- " Only attended the Graduation ceremony. I was disappointed that we didn't get a Big Bash this year, but I can understand. I thought the ceremony was good.
- The masking issues also need to be addressed. You can't say they are suggested and then get upset when people aren't wearing them. Either you ask people to wear them, or you let people do what they want to. You can't have it both ways. If you tell people where the target is, we will hit it, but when you keep changing the rules, it makes it really difficult to follow and then to respect them.
- I have a suggestion for the future as well. Instead of having a half day on the last day of the week, why not put that on the front end and start the week off with homeroom and then the first core class? It seems kind of difficult with travel arrangements and just sheer tiredness to have that last, brutal class (especially for those who graduate!) Just a suggestion."
- The Board of Regents truly cared about making sure the graduates had a good experience, even without Big Bash. The Champaign toast and breakfast were very much appreciated.
- Interactive, fun

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- I attended the Tuesday evening event which was a great way to connect with those who arrived early. Graduation was conducted very well.
- I enjoyed the closing event.
- I understand things are different because of covid - but it would be nice to still have a dinner included with graduation. If cost is becoming a barrier - then have it as an additional cost to attend the dinner on the registration?
- The champagne toast and breakfast for Class 4s was a nice touch since we weren't able to have a formal dinner after graduation. In the future maybe add the dinner back in (even if you have to increase the cost) but no dance. Dinner could even be an optional add-in.
- We needed a few more minutes for homeroom being 4th years. Didn't have much time left after rehearsal. Graduation was nice, would have been nice to have a small reception, maybe apps and drinks.
- The kickoff was great, and the energy was high! This set the stage for a wonderful week! I think the attendance at the mixer and graduation was lacking this year. There seemed to be a much lower turnout at the mixer and many people skipped the graduation complete, if they were not graduating.
- I thought all went very nicely, and I look forward a year when we can all interact without the auspices of COVID. The kickoff was a lot of fun--as it was the past four years--and graduation was very well done. The speeches were outstanding, and the ceremony was most appreciated!
- Understood but disappointed that the Graduation did not include a recognition dinner. The Kickoff was fun.
- It is always interesting when everyone is trying to decide on where they will go. I would think that maybe some of that might be decided before hand as it puts a stress on the class advisors as well as the restaurants in the area.
- I was really sad that we didn't get a graduation dinner. I understand the circumstances, but felt the graduates were at least owed a meal, or cocktail hour, or SOMETHING. I did appreciate the champagne toast. Hopefully it was just a product of this year's circumstances.
- Including this comment here because I didn't see another place for it....and it won't really affect me having graduated, but I really didn't like ending on a Sunday. I think in the past we've had to travel there on a Sunday, but I don't remember the session going through the weekend. With travel to Tucson challenging anyway, trying to get home in time to be productive the next Monday was a struggle. I would recommend keeping the conference to work-week days...and maybe dipping into the weekend for travel, but not for mandatory classes.
- I was sad there wasn't a Big Bash since I was finally graduating but understand. I think the fee should have been reduced somewhat or our class advisor should have been given a credit card to pay for our class dinner.
- My class had one of the best Advisors and he did an exceptional job!
- LOVE all the activities that you have planned. It really helps build the relationships from the very beginning.

(End of Fourth Year Comments)

Q5: Please provide comments on your experience within your core class.

- I could not have had a better experience. I learned so much in my core classes, and my 1-1 group is incredibly supportive. I made so many new friends, and I know we will be great resources and support for each both personally and professionally in the years to come.

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- I liked having a core group of classmates, it enhanced the experience. I was expecting the core courses to be more academic in nature. They tilted heavily toward leadership development and soft skills.
- Wealth of knowledge and lessons to take back to our team & board.
- Love my classmates. I'm impressed by their dedication to their orgs and their communities. I hate the idea of Fast racking without them.
- I fell in love with my class and the instructors! I have pages of to-do items and can't wait for next year!
- Or 1-2 leader, (removed)is amazing. Approachable, professional and knowledgeable. Good diversity of chamber locations in our group. Would love to see large city or other state chambers in the mix to be able to learn from one another a bit more on ""like-minded"" business models. Also, ALL speakers had high energy and engagement, kudos!
- The concern is many speakers and courses were VERY 101 level.
- For example, CRM class was basically- if you don't like your CRM, you should get a new one, if you don't have one, consider getting one. I was looking for: consider these reports, data pulls, e-engagement ideas, etc.
- Membership class, I was SO looking forward to on tools and tactics of increasing engagement to improve retention rates and new member recruitment ideas. I even shared this at the beginning of class when asking ""what are your expectations"". The class was entertaining and inspiring; however, it was a motivational speech which left me feeling dissatisfied not growing in the area of content.
- Economic Development- she cares a LOT and love her energy. This was not directly helpful to state chamber world, however good to hear great things are local chambers are doing and allows me to ask the questions- how are we partnering with our local and state Econ Develop. Orgs.
- The classes I valued were Board Gov, Finance and DEI. DEI could have used more practical chamber/based tools as well, but very eye opening. Received some quality take-aways from Raymond's class as well.
- Overall, the education seemed very catered to small local chambers (which I understand is the majority of your audience) so I kept an open mind, however it was tough to try to continue to ask the right questions and draw parallels to state chamber activities and goals. I look forward to continuing along with IOM as I am sure each year will bring more insight.
- Thank you for all your hard work on coordinating this!"
- The syllabus didn't always match what was discussed. I would also like to see core class go deeper. I we're all industry professionals, so let's start deeper.
- DEI needs to be taken off the schedule for the last day. Everyone was too distracted about their flights to actively participate.
- Core class was good. I wish I could have gotten to know them better.
- Core classes and instructors were all great! I learned so much from each of them.
- The content was appropriate and helpful (although some instructors strayed a little bit) and the group was very engaged with and interested in each other. Some aspects which are not repetitive for instructors, but are for the class, could use some extra thought.
- Great content! Enjoyed building relationships
- All the classes were excellent!
- We had a fabulous group in the 1-1 class, we made fast friends and shared so much with one another right from the get-go. It was so nice to be around so many peers who get what I do.
- (removed), (removed), and (removed) were the best sessions of the week. A few other core classes fell short of my expectations. I need tools and resources I can take back to my Chamber and implement right away (ex: (removed)

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2022 Winter Attendee Survey Results

governance documents). I appreciate conversations around building relationships, leadership, etc., but my favorite sessions were immediately actionable (policies, building a DEI statement, etc.).

- I love the core classes. My only comment is that scheduling wise, my finance core class was the last class, but the executive finance elective was the first elective. Taking the elective before the core class was less helpful.
- Very valuable information!
- "I guess the size of my 1:1 class was considered fairly large because faculty would comment on it at the start of class. With 45 or so folks you will automatically develop smaller groups within the cohort which is normal. I found I was able to develop connections with about 2/3 of the class. Even though we were so large, it didn't stop us from (over)sharing and getting pretty frank about social topics. I feel most were comfortable with asking questions and giving comments which was great! And I truly enjoyed the diversity of the group.
- That all said, I would like to explore IOM at Villanova because it will likely draw more Northeast chamber professionals. It didn't hinder me from connecting in Tucson, being the only one from New England/Northeast, but it was heavy with mid-western states and how their chambers operate from mine. But all good!!"
- "My first class was on board governance. I sent this text to my husband: ""Holy crap. Only an hour into this first session and I'm blown away! Very valuable info!"" They were great! Well, the communicating with confidence one was not great, but the rest were awesome.
- Adding additional comments here (as I don't see another spot to add comments): the app was fine, but I couldn't rate the courses/instructors on there. It kept glitching out.
- Also, I thought the food was excellent! Nice to not just have soup and sandwiches all week. Nice variety, and all was great! Appreciated having access to coffee and tea throughout the day as well."
- The Governance, HR and Financial courses were the most valuable to me.
- Loved our class and (removed) did a great job!
- I enjoyed listening to situations and comments that my classmates shared. I'm sure it will help me somewhere in my future.
- Excellent

(End of First Year Comments)

- Everyone was friendly and encouraging.
- All of the core classes were good with the exception of Events Strategy and Operations. The instructor did not do a good job in making it relatable to Chambers/Trade Executives.
- It was wonderful to see friendly faces. Each were willing to share their best practices when asked.
- All of the core classes were beneficial to my organization. They were broad but specific enough that they applied to both chambers and associations. All of the instructors were engaging and encouraged freedom of thought.
- Our class advisors were great, and our class overall was great with people willing to share and collaborate.
- Great class. Everyone very kind, excited to be at IOM and willing to share experiences, etc.
- LOVE my core class. Cannot wait for next year!
- Not all speakers are created equal, and a great practitioner doesn't make a great presenter for a subject. It's hard to find that balance, but I think new speakers need a better idea of how to teach at IOM. We had a speaker on events/meetings who totally missed the mark, but I could tell had a lot to share with us. It's like he wasn't prepped on what should be in the class. Rest of the core classes were great, especially law class. Anyone who can do three hours on zoom and be so engaging (and insightful) is worth their weight in gold. He needs to teach all the legal classes at all sites.

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- This year, I found all my classes to be FUN while providing good information on what some would say the subject could be boring. Great takeaways from all!

(End of Second Year Comments)

- Classes themselves were very good. Frustrating that not everyone in my class adhered to the masking requirement, and even more frustrating that we were packed into class so closely together without any opportunity to distance ourselves.
- Our core classes were great!
- I had a great experience with my class; however, I didn't have a connection with Class Advisor and didn't feel she cared to have one with us either.
- Core classes were the best this year, comparing to previous years. All fantastic instructors, great/necessary content.
- My core class was interesting. There were little pockets of people including the group I was with that stuck together. It never felt like the class really bonded.
- The core classes were really good.
- My core class has been through a lot! :) Like others, many of us had our graduation year delayed (we were supposed to graduate 2022, some completed Centennial and were able to maintain that date but most of us are just delaying our graduation to 2023). But in addition to that, we started out really big, absorbed some folks from California, taking on fast trackers, etc. This year, we were fortunate to have (removed) fill in as advisor when Meredith could not make it. But I feel like this quick change did not really allow for us to re-gel as a class. We did not spend time learning who everyone in the room was. Out of 30 people there was a good group of us who knew each other, but there were also many newcomers and I think there should have been a coordinated effort led by IOM during homeroom to go around the room, share a little about ourselves, just to build/rebuild that connection as a class. While some class members made an intentional choice not to join in on class dinner and group meetups, I feel like some folks may not have joined because they felt left out. Some members of our class have had discussions on how we can improve this next year on our own, but again I think it was a missed opportunity this year. I get the sense that it may be unusual for a class to go through so many changes, but the reality is that it does. For that reason, I think this would be a good practice to apply to all returning classes.

(End of Third Year Comments)

- Enjoyed the core classes. Very informative.
- My core classes were all good.
- 4-2 ROCKSTARS! An outstanding group of individuals. Yes, there are some COVID cases in my class. I am not surprised, nor do I have any regrets about attending. We are all adults and knew what the risks to attend were. I think some people outside of my class had the expectation that everyone would wear a mask at all times. However, the masking request was ineffective in the end because many classes decided not to wear them while in class. ((removed) reminded us of several times EVERY day that IOM wanted us to wear a mask, and he always kept his mask on, so he did his due diligence.) Also, lunches were a buffet, and we were allowed to sit and eat together, which pretty much makes any mask mandate a moot point. I am fine with that decision, as the box lunches were really unfortunate (I know that was a staffing issue at Athens) at Centennial Institute. I have been running in-person events since the fall of 2020 (yes, we started back much earlier than most) and we simply have our attendees acknowledge the risks of attendance. The precautions they take are not mandated and are left up to the individual. We do not require vaccination. I am fully vaccinated with a booster myself, but that's my decision. It's also the reason I could attend IOM, but others could not. I think that if IOM wants to keep this

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2022 Winter Attendee Survey Results

stringent of a policy in place, that non-vaccinated people should be allowed to attend based on daily on-site testing with cost/arrangements being the responsibility of the attendee OR provide the virtual option for unvaccinated people until we're 'back to normal'. I'm not sure if there is a normal at this point!

- Interactive, learning, close knit, comfortable
- Core classes were great! I am a transplant from Midwest and everyone in the class welcomed me into the group. My direct supervisor registered very late, and he was placed in the same core group (4-1) as me. I was surprised by this, and it did allow me to speak freely during some of the conversation.
- The fourth year was definitely the best concerning the topic of speakers and education. From the leadership class, state of the industry, legal class.... all of them were informative and relevant.
- My core class was great. (removed) did a great job of bringing a diverse group together as one.
- Most of them were great. It was a little tough (mentally) to do the morning law class and afternoon policy classes back-to-back all day. I loved that we had Justin as our last class though!
- The core classes were great, and I feel like I really learned and grew from these classes, as well as the electives.
- "We had a good co-mingling of our original group who did all four years in Tucson, a group who joined us from Midwest, and a mix of others to form the bond that always occurs as a result of Chamber and association people mixing together at Winter Institute.
- I enjoyed spending most of our classes together as a group and particularly enjoyed the Year 4 curriculum this year as it truly did seem ""higher level"".
- The 11 of us who went all four years together are forever linked as friends and family, not just business colleagues."
- Overall, the core classes were informative, and the instructors were knowledgeable. The instructors provided the opportunity for class members to interact and share information.
- As I said before, it was not a cohesive group which could not be avoided because of COVID. My hope for upcoming classes is that they can integrate better and not try to isolate.
- I really bonded with my original core class therefore, I didn't love the combining of those who were supposed to graduate in 2021 and those graduating in 2022, but I understand why it was done. I know time is tight, but I wish there was more time dedicated to networking with classmates during the day. By the evening, we are all exhausted and want to talk about another other than work. A few of the instructors allowed for this and I really enjoyed learning from my classmates.
- My core class is amazing -- many of us stayed together throughout all this mess. I was so happy to have graduated on time.
- It was all I had hoped for and more, our class will always connect and help each other professionally or personally.

(End of Fourth Year Comments)

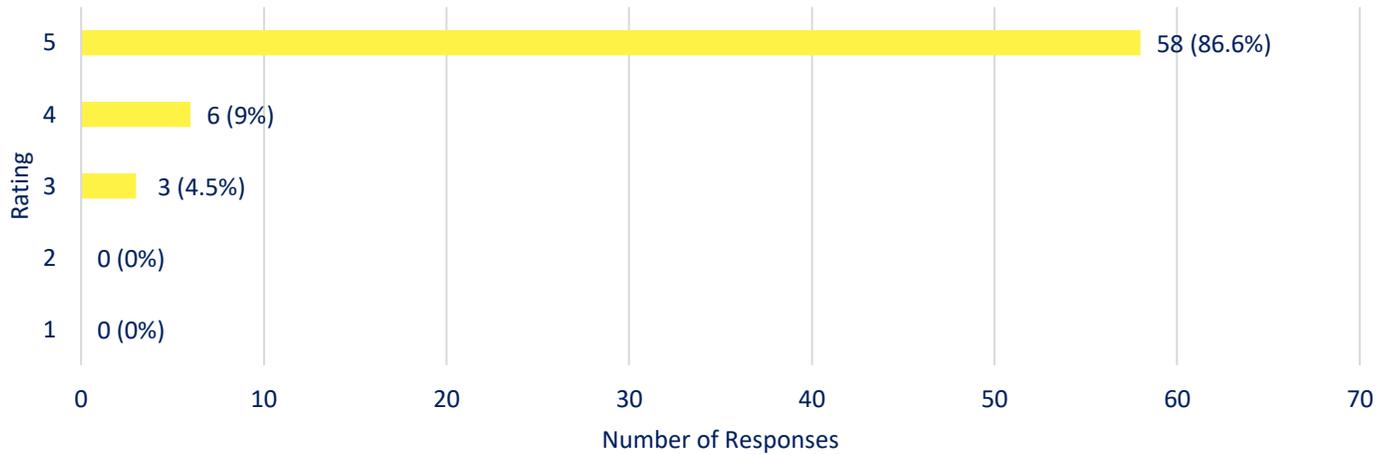
Q6: Rate to what degree you agree with the following statement:

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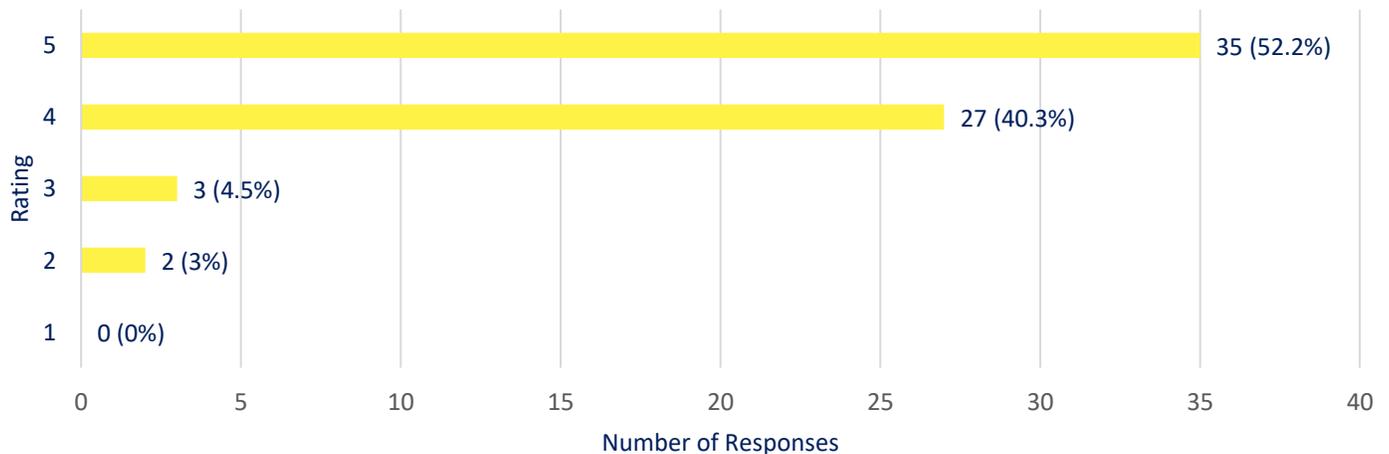
2022 Winter Attendee Survey Results

Institute provides a good networking opportunity in nonprofit management.



Q7: Rate to what degree you agree with the following statement:

The Institute courses were conducted at a suitably challenging level for me.



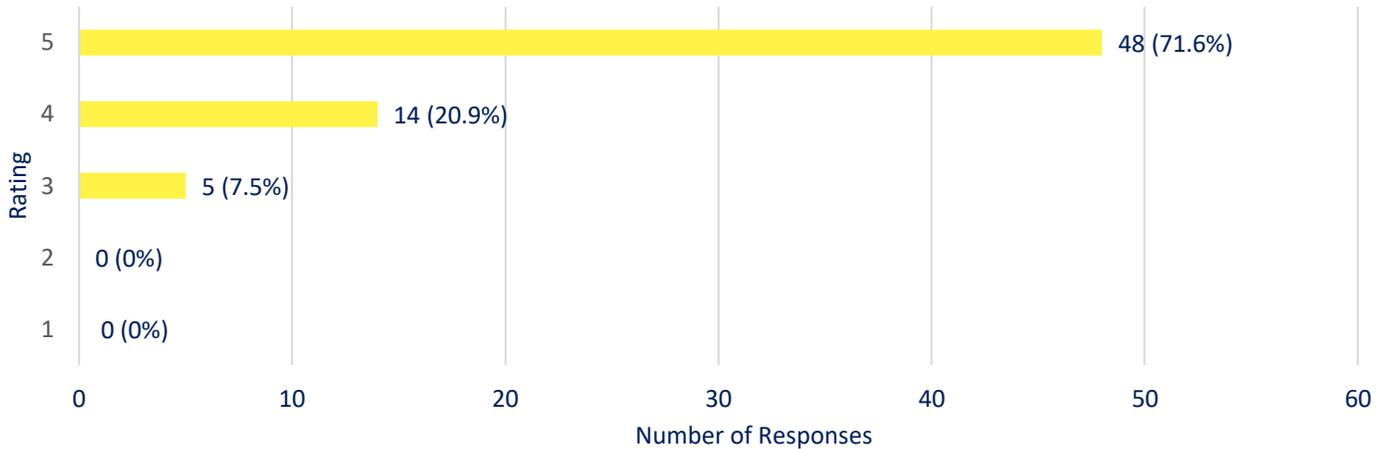
Q8: Rate to what degree you agree with the following statement:

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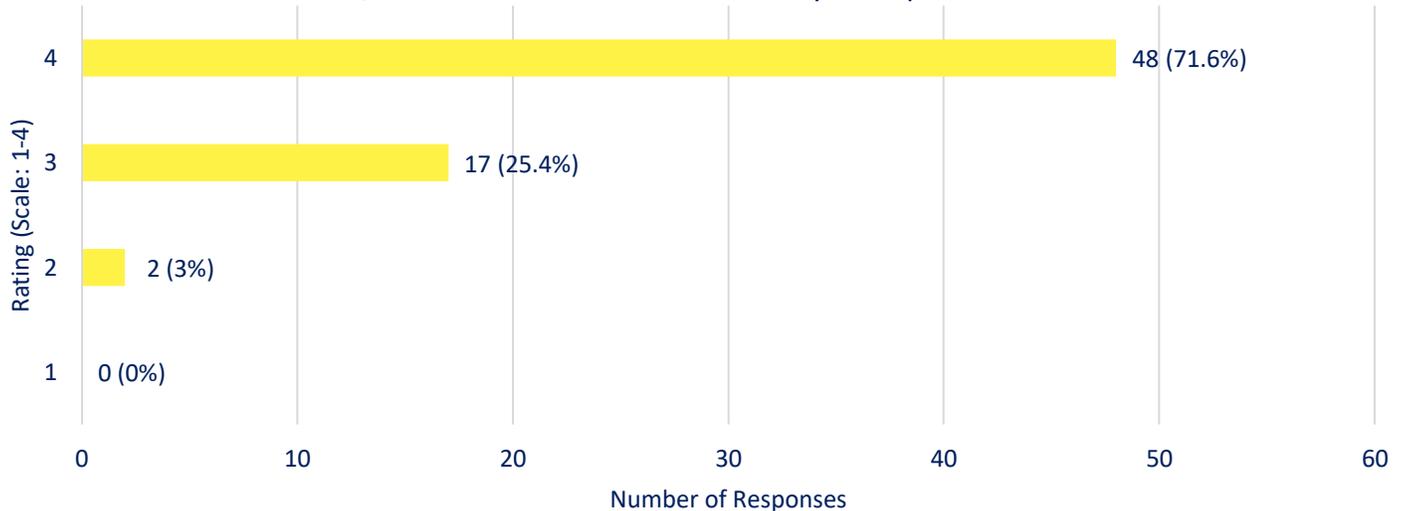
2022 Winter Attendee Survey Results

The Institute curriculum provided valuable professional development.



Q9: Overall, to what extent did Institute meet your expectations?

Overall, to what extent did Institute meet your expectations?



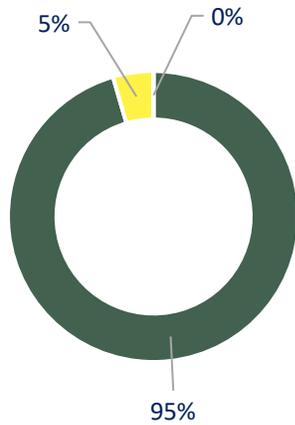
Q10: Would you recommend Institute to other nonprofit professionals?

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Would you recommend Institute to other nonprofit professionals?



- Yes, I would recommend Institute at this site.
- Yes, I would recommend Institute, but not at this site.
- No, I would not recommend Institute at all.

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