



Northeast Board of Regents Minutes

June 11, 2026

12:00 p.m. EST

In attendance: Heath Barret, IOM, CCE; Susan Spears, IOM; Cereto Bean, IOM; Richard Gordon, IOM; Iman Hannon, IOM; Ashley Walton, IOM; Cici Francisco, IOM, CDP; Sam Kolb

I. Welcome and Approval of Minutes

Heath Barret, IOM, CCE welcomed everyone to the meeting. No quorum was present, so the minutes were not approved.

II. Staff Update

- It was reported that 76 attendees were registered at the time of the call, including 16 first-years. Staff noted that enrollment is currently behind the same point last year, when registration was approximately 90.
- 47 people were on the ABNYR list who may still potentially register for Northeast. Of those, approximately 7 to 8 have indicated plans to register, while approximately 40 have not responded or have not provided an update regarding their intentions.
- Additional recruitment efforts from staff were shared:
 - Northeast registration has been included in Federation email promotions.
 - Staff is coordinating with ASAE to include Northeast registration messaging in connection with promotion of Justin Patton's institute-sponsored appearance.
 - Early enrollment closes Friday, July 5.
 - Final enrollment deadline is July 15, 2026; and once Southeast registration closes next week, Northeast will be the only remaining site option.

III. Retention and Recruitment Check-In

The Board discussed the need to increase overall enrollment, with particular concern regarding first-year participation, which currently stands at 16 out of a goal of 41.

Discussion focused on several strategies, including more personalized outreach to prospective first-year attendees, stronger messaging around the professional value of the program, use of existing recruitment resources and support materials, building stronger relationships with state chambers and state association organizations, and targeting prospects in nearby states who may be able to attend at lower travel cost.

The group also discussed that the challenge may be less related to budget limitations and more related to awareness, messaging, perceived value, and competition from other professional development programs.



Staff noted that a more streamlined outreach and partnership strategy with state chambers and associations is in development.

Regents agreed that phone outreach may now be more effective than continued email follow-up, and various regents offered to step in to conduct additional outreach.

The Graduate Replacement Initiative was also referenced, for which regents will play a role in connecting with graduates, encouraging them to replace themselves and to stay engaged.

IV. Regent Updates and Discussion

Heath Barret, IOM, CCE

- Fundraising and Scholarships – **Mary Griffin**, Andrea Wong, Ashley Walton (merch), Jessica Capistrant (merch)
 - The team continues to collect donated items for the silent auction, and Class Advisor communications will include information regarding donation opportunities.
 - The merch store is underway, and proposed items include hoodies, quarter-zips, polo shirts, t-shirts, backpacks, and tote bags. Regents will circulate logo concepts.
- Registration/IOM Expo/Opening Welcome/Kickoff – **Tamara Tateosian**, Jessica Capistrant, Mary Griffin, Cereto Bean, Danica Williams
 - A bingo card-style engagement activity is planned for the Expo.
 - Updates include allowing later arrivals to participate, setting a later submission deadline, and holding prize drawings during scheduled breaks to encourage participation.
 - The team is also coordinating with staff to ensure that table placement and event flow work effectively.
 - The Board also briefly discussed whether to encourage informal class gatherings or another optional gathering on Sunday evening following homeroom. Further discussion is needed.
- Pre-Site Activity – **Heath Barret**
 - Two pre-site activities are in development: an optional Saturday evening happy hour, pending final venue confirmation, and a Sunday morning walk at 8:00 a.m., tentatively titled the Northeast Connection Walk.
 - The Sunday morning walk will proceed as planned. Staff will provide a further update regarding the Saturday happy hour once venue confirmation is received.
- Fourth Year Recognition – **Cereto Bean**, Iman Hannon, Tamara Tateosian
 - Confirmed details include location: Driscoll; graduate photos: 5:30 p.m.; reception: 5:45 p.m.; ceremony/program: 6:30 p.m.
 - The team also plans to continue the “Pass the Torch” activity involving fourth-year and third-year participants.



- Lunch Roundtables – **Iman Hannon**, David Falchek, Richard Gordon, Danica Williams
 - Discussions will take place on Tuesday, July 28, 2026, at 12:30 p.m. in the cafeteria.
 - Current topics and facilitators include:
 - Credentialing / CAE – David Falchek; CCE – Heath Barret
 - AI Strategy – Richard Gordon
 - Resilience, Risk, Leadership Readiness, Succession Planning, and Continuity – Iman Hannon.
 - The following topics remain under consideration: Culture Building and Digital Transformation.
 - Richard Gordon offered to incorporate Digital Transformation into his AI Strategy roundtable if no additional facilitator is identified.
- Class Dinners/Activities – **Richard Gordon**, Susan Spears
 - Recommendations were gathered from the Main Line Chamber and shared with Class Advisors.
- Site Culture/Theme – **Jessica Capistrant**, Cereto Bean, Iman Hannon
 - Site culture efforts continue to develop through coordination across several planning areas, including branding, shirts, engagement activities, and overall participant experience.
 - The goal is to create a distinctive Northeast identity while maintaining an experience that is welcoming and manageable for attendees.
- Industry Consults – **Cheryl Kuhn**, David Falchek
 - Staff reported that the industry consult process will generally follow prior years' procedures, with emphasis on ensuring that roles, pairings, and spreadsheet tracking are clearly assigned.
 - Staff also advised that onsite communication with attendees should be handled primarily by text message or phone, rather than email.

V. Other Business/Adjournment

Staff reiterated the value of the Graduate Replacement Initiative and encouraged continued discussion around alumni outreach as an additional recruitment strategy.

There being no other business, the meeting was adjourned.