U.S. Chamber of Commerce
Institute for Organization Management

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Winter Board of Regents Minutes

November 12, 2026

12:00 p.m. EST

In attendance: Chris Romer, IOM; Megan Schlimm, IOM, CAE; Kathi Roetter, IOM; Katie Doherty, IOM; Ashley Engles-Ross, IOM; Sheriffa Jones, IOM; Mike Kurz, IOM; David Schroedel, IOM; Kyle Tarbet, IOM; Gary Troutman, IOM, CCE; Esmy Villareal, IOM; Britain Walker, IOM; Tara Watson-Watkins, IOM; Karyn MacRae, IOM, CAE, CMP; Cici Francisco, IOM, CDP; Julia Fayer

I. Welcome and Approval of Minutes

Chris Romer, IOM welcomed everyone to the meeting. The minutes from meetings on October 8, 2026 and October 9, 2026 were approved with no changes.

II. Staff Update

Staff provided the updates below.

- Webinars
  - The group was encouraged to view the recording* for the recent webinar, *The Future for Associations and Chambers*, facilitated by Bob Harris, IOM, CAE.
  - It was confirmed that the webinar series will take a holiday break in December and will resume in January.

  **Recording will be posted here when available.*

- Partnerships Call
  - Regents were reminded about the upcoming optional Partnerships Task Force call, which will take place on Tuesday, November 17 at 10:00 a.m. EST, and will mainly be a brainstorming session.

III. Recruitment and Retention Updates

- Enrollment Numbers

  It was reported that at the time of the call, there were 200 total attendees registered, including 44 first-years, 61 second-years, 46 third-years, and 49 fourth-years.

  - Regents were reminded of the recruitment recommendations shared earlier in the week, and were encouraged to select at least one to do.
    - Personally extend an invite to 5 organizations. Focus on organizations that you believe have stopped sending attendees or have never participated.
      - Resources to send:
        - About Institute | U.S. Chamber of Commerce
        - Institute Sites and Registration | U.S. Chamber of Commerce
        - 2027 Winter Institute Registration

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- Reach out to a state association and ask them to include IOM materials in their next email. Please feel free to reach out to me for IOM materials, which can be forwarded to them.
- Contact 3 ASAE/ACCE friends and invite them to Tucson.
- Request physical marketing materials if you have an opportunity to market Institute in-person before the December 9th Final Enrollment Deadline.

- In addition to the first-year recruitment tips shared previously, regents were reminded to continue their quarterly outreach efforts to their ABNYR contacts.

- Legacy Program
  Staff provided an overview of the Legacy Program (formerly named Graduate Replacement Initiative) and confirmed that more detailed information, taking discussions and feedback into account, will be shared in the coming weeks.

IV. 2027 Winter

- Review Goals

  - Make authentic and intentional personal connections every day while on-site, remembering to include attendees from all years.
    - There is no set number required, but rather a soft target of three per day.

  - Raise $15,000 in fundraising efforts.

  - Be intentional with fourth-year outreach and engagement while searching for future leadership.

- Committee Reports and Discussion

  - Class Advisors/Regent Partners (Megan)
    - The orientation call went well and communications with class members have begun. Regent Partners had a successful best practices call earlier in the week.

  - Fundraising and Scholarships (Katie, Kathi, Ashley, Megan)
    - As of now, the merch store is slated to close on November 15, but Katie has requested a deadline extension. Regardless, it will open back up on-site.
    - Committee members are meeting soon and will have additional information to share.

  - Pre-Site Events
    - Saturday Golf (Mike, Britain)
      - The event will take place from 1:00 – 5:00 p.m. 40 spots have been saved, and golf pros will be available for clinics.
    - Saturday Foodie Tour (Kathi)
      - This will be on the casual side, in order to accommodate people coming in on a rolling basis, with the ending spot taking placing from 6:30 – 7:30. An electronic passport is also being worked on.

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- Saturday Hike (David)
  - This will be a 5-mile hike at Sabino Canyon ending with lunch at Amelia's.
- Sunday AM Walk (David, Ashley)
  - This will be a 3-mile walk (or job) at sunrise, leaving from the Marriott.
- Sunday Brunch (Tara)
  - Details are confirmed at Agave House, and participants can order off the menu.
  - Additionally, the faculty/volunteer dinner will also take place at Agave House.

- Registration and IOM Expo/Kickoff (Bree, David, Britain)
  - The committee will recruit volunteers to assist with escorting people over to campus.
  - Additionally, they are brainstorming ways to encourage early arrival and engagement.

- Industry Consultations (Gary, Tara)
  - Information will be pushed out through Class Advisors and directly from the committee as well.

- Lunch Table Topics (Bree, Kyle)
  - Some topics, such as Foundations, AI, continuing your IOM journey, events, AMA sessions, etc. will be finalized and promoted in advance. Additionally, there will be space later in the week to allow for 'in the moment' topics.

- Fourth-Year Recognition (Chris, Kathi)
  - The graduate breakfast will move to Thursday morning and will take place on-campus. Staff will finalize logistical details.

- Social Media (Britain, Sheriffa)
  - LinkedIn Warriors has proven helpful for pre-site social engagement.
  - Everyone was reminded to take pictures on-site and upload them to the shared album.

- Class Dinners/Activities (Sheriffa, Kyle)
  - Committee members will have a finalized resource document to share with advisors by November 20.

V. Other Business/Adjournment

Regents were reminded of the early enrollment deadline on November 20, after which tuition will increase by $200.

Staff will schedule another (tentative) call in December, with the option to cancel if not needed.

There being no other business, the call was adjourned.