



International Association
of Business Communicators

Stronger Together IABC Organizational Design Taskforce Final Report

April 26, 2023

Context

In 2021, IABC introduced a new strategic plan, *Stronger Together*, which emphasizes the collective power of one seamless global organization in responding to the changes affecting our world, our profession, and our association.

In developing the strategic plan, the IABC's International Executive Board (IEB) recognized that our decades-old organizational structure, which served us well as an association of 16,000 members and 100+ chapters, is now too complex for our 6,000 members in 43 chapters. The IEB acknowledged that the association must evolve and adapt if it is to meet the current and future needs of members and volunteers.

In 2022, the IEB set up an IABC Governance and Structure (Stronger Together) Taskforce to help the executive leaders and staff consider how we can best organize ourselves structurally and operationally to thrive in the future and deliver on that strategy. See **Appendix I** to read *Stronger Together IABC Organizational Design Taskforce Terms of Reference*.

The case for change

The case for change rests on four pillars:

1. Investing in our future

The world is changing, including the communication profession. The governance, structure and processes that have served IABC well for fifty-three years need to evolve if we want to survive and thrive for future generations of members.

In McKinley Advisors' 2022 Association Viewpoint report, *An Age of Acceleration*, they noted that "for decades, associations have often settled for the path of least resistance, allowing complicated bylaws and convoluted governance structures to survive despite ample evidence of their negative impact." They go on to say that there is an urgent need for "associations to evaluate legacy structures, policies, and norms that prevent their ability to adapt" to a changing environment.

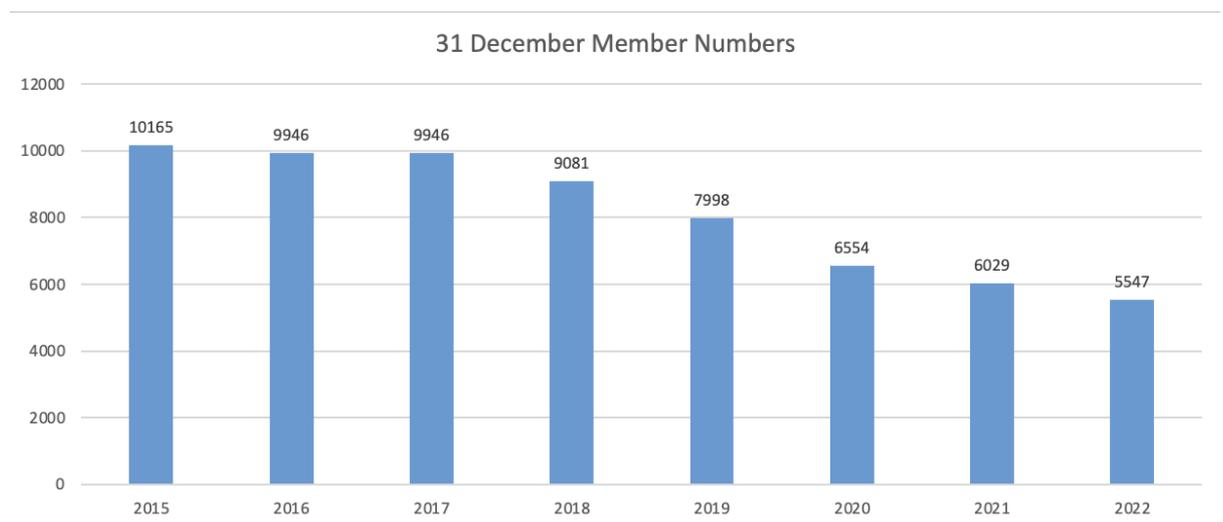
The taskforce studied organizations that have been built for the future and have seen how they have restructured themselves to be more agile to meet the ever-evolving needs of their customers and stakeholders.

The last couple of years have been hard and have changed the way most of the world goes about doing business. IABC needs to change, too, to meet the challenges that lie ahead. The work we are doing together now to get our own house in order will ensure we are well positioned for the future.

2. Setting ourselves up for membership growth

The pandemic has had a significant impact on membership retention and growth. The year-on-year decline we have seen in membership numbers for more than a decade has accelerated since 2020.

International Membership



A smaller and declining membership base in nearly every chapter around the world and for the overall association challenges our ability to be the voice of communications professionals internationally.

We have choices to make around which existing and new programs are most effective in delivering member value and work together at all levels of the organization to make them successful.

Our current structure does not provide us with the flexibility and agility needed to collectively address the membership challenge. In fact, our current structure often results in silos that prevent us from working together collectively for the good of the global organization.

3. Ensuring we are financially sustainable

IABC has struggled to be profitable since 2011. Expenses to manage the global center have typically matched or exceeded revenue. In 2020, IABC moved from employing a full-time staff to a shared services model with an association management firm. This shift gave the association more flexibility in budgeting while still giving access to expertise in all the services needed.



That same year, the pandemic significantly weakened our revenue position. The historic profits from the World Conference, which have played an important role in keeping IABC afloat, evaporated. This, along with a decline in membership revenue, has had a significant and negative impact on operations.

The 2023 International budget was crafted to address these trends. We set out to reverse the negative net assets trend by securing a net income at the end of the 2023 fiscal year. This will support the continuation of the association into 2024, but financial sustainability beyond that will be challenging.

Our current banking approach – where nearly every chapter, region, and international level of the organization has one or more bank accounts – is an antiquated cash-management model that no longer makes sense in a world of online payment processing and e-commerce activities and costs us in unnecessary fees and transfers. We need to investigate and implement more efficient ways to collect, budget, distribute, invest, and spend our members' dollars wisely and consistently across the organization, for maximum member benefit.

To truly stabilize the Association's financials, we need to ensure that our international revenue programs consistently deliver member value and profitability. We need to find innovative ways to share revenues with regions and local communities that market those programs to communication professionals.

4. Reducing the administrative burden for our volunteer leaders

Volunteerism within associations has changed considerably in recent years since members of professional communities have more demands on their time than ever before. The current structure and high expectation of IABC volunteers output around administration has had the effect of reducing the available pool of candidates for leadership roles, which in turn has forced some chapters to struggle or close.

To attract volunteers, IABC needs to create more strategic leadership opportunities and drastically reduce the administrative burden that is taking a toll.

Approach

The Taskforce convened in July 2022 to scope the work to be done based on the *Terms of Reference* and bearing in mind the case for change.

Research and discovery

During July, we undertook a desktop research exercise. We drew on IABC data (including previous surveys with members and leaders), as well as third party research, existing IABC thinking, lessons from other professional associations, and the experience of association management company Smith Bucklin.

Work program

In August, we established three dedicated workstreams:

1. **Where work should be performed.** A review of chapters and regions to determine first where the work is currently being done, look for duplication of effort, trends, risks and opportunities, then make recommendations on where it *should* be done.
2. **Member & volunteer experience.** Consider frameworks that could improve the member and volunteer leader experience, including members at large – all with an eye to creating a pipeline of talented volunteer leaders.
3. **Member & Volunteer Engagement.** Plan engagement of stakeholder groups to test the possible structure and governance model and get feedback on how to improve. Prepare a supporting communications plan.

Findings

Each entity of the association — international, region, chapter— generates revenue and delivers programs. However, the overall delivery can be fragmented and the quality inconsistent due to the lack of resources to support programs. There is clearly an opportunity to align each entity and create a more coordinated and consistent member experience. More alignment will have the effect of creating more revenue opportunities through consistent and new programming.

See **Appendix II Research & Discovery** for more detail on how we approached the research including the 'Where work is done' data capture and our key insights and findings on

considerations for where work could be done in a redesigned organization; much of which will be the focus of a second Taskforce.

Engagement

Once the initial proposal was approved by the IEB in early January 2023 we embarked on an extensive engagement process with volunteer leaders across the globe.

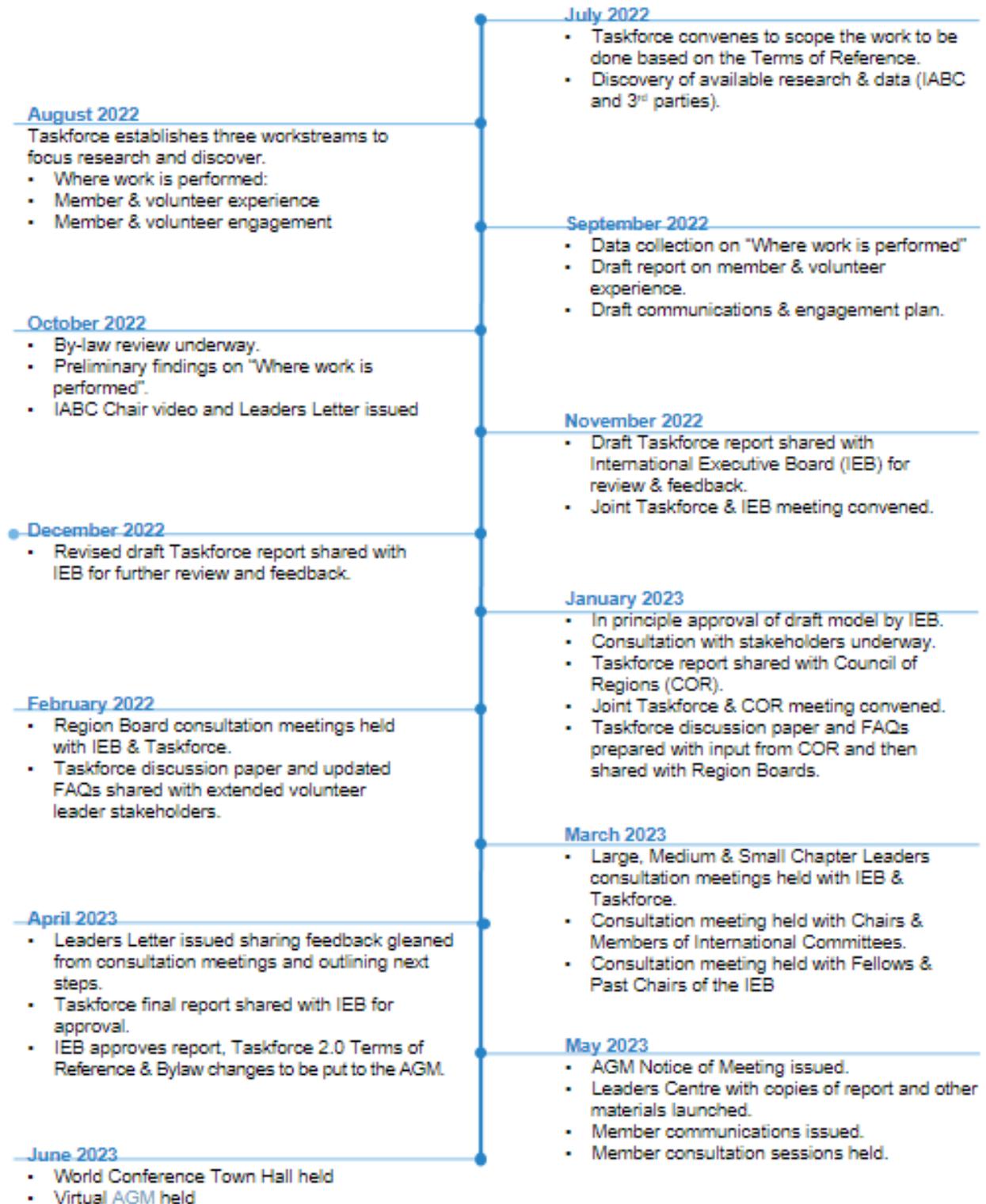
In all, we hosted more than 15 listening sessions and received valuable input from our leaders at all levels around the world, past and present, on how we can work together to evolve the governance and structure of IABC to survive and thrive for future generations.

In April 2023 we shared back with leaders a summary of the key themes that emerged in our meetings, and that have informed this final report. See **Appendix III, IABC Organizational Structure and Governance Feedback Review** for a *summary of all feedback and how it was addressed*.

Based on the valuable feedback, key shifts in this paper include:

- Reinstatement of Africa as a region. Initially the recommendation was to fold Africa into the EMENA region. After further consideration of market, language, currency, and banking laws, we have included Africa as a stand-alone region.
- Recognition of complexity in centralizing finances and the need for customizing solutions that align with banking and region infrastructure
- Use of the term “Regions” has been reinstated to denote the different geographic areas of the world.
- For accuracy, use of the terms *US East* and *US West* have replaced the term *Americas*. Members-at-large in the Latin Americas will be assigned a US region until membership grows to support a standalone Latin America region.
- The details of research conducted by the taskforce, have been added back into the Appendices for distribution.
- An IABC AGM & Delegate Voting: A Primer has been developed to explain the voting process, governed by IABC bylaws, and exactly what will be brought to vote at the annual general meeting, to move forward with the proposed model.
- Terms of Reference have been developed for the new taskforce (*see Appendix IV*) that will work with stakeholders to design detailed requirements for the implementation of the proposed model, as well as a change management plan, supporting engagement and communications.
- A suggested timeline for moving this change into practice, has been developed.
- For clarity, more detail has been added to the description of the proposed model.

Timeline



The proposed model

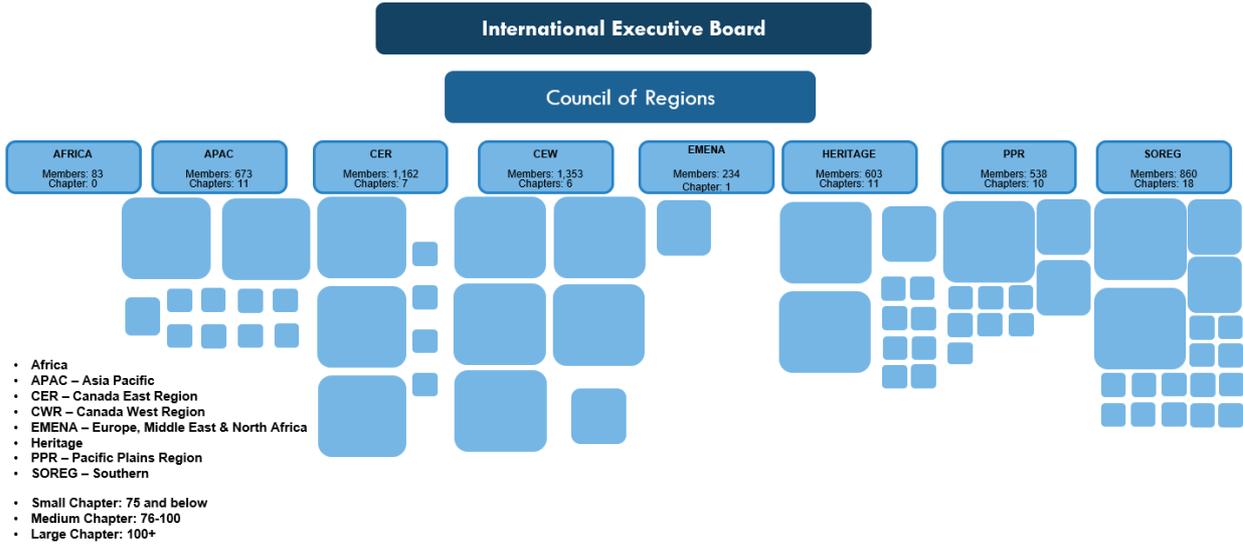
The proposed model is member-centered and designed to delegate more strategic decision-making and financial control to the regions, closer to their communities.

Members would belong to at least one, but potentially multiple communities, with much more flexibility around the definition of a community, to allow groups of like-minded members in a common geographic or subject-matter area to form as appropriate, without the constraints of budget and administrative management. That could be done through a formal chapter as currently, but also as a networking group, a special interest group or through volunteering opportunities at the regional level. The goal is to get members plugged in with others as soon as possible. Each community falls under one of seven regions, empowered to manage budgets and tailor delivery of programs to their market. The IABC Global Center remains responsible for brand, budget, and global programming.

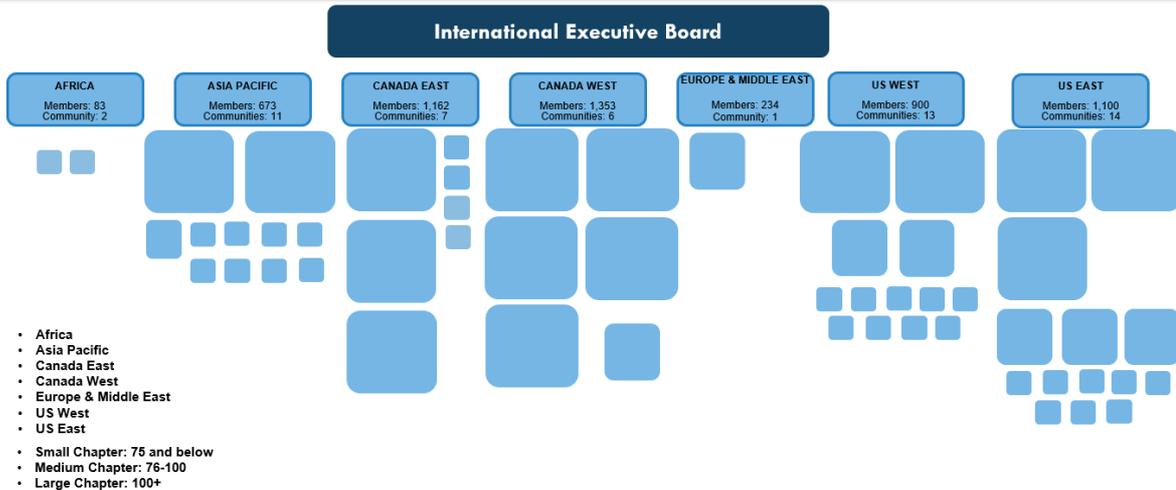


The seven regions include Africa; Asia Pacific (APAC); Canada East; Canada West; Europe & Middle East (EME), US East and US West. As membership grows, the number of regions can increase as needed to serve members and expanding markets.

CURRENT STRUCTURE



NEW STRUCTURE



Overview of Proposed Model

Global Center	Regions	Communities
<ul style="list-style-type: none"> Governed by an expanded IEB including representation from all regions. 	<ul style="list-style-type: none"> Governed by a strategic board, with directors recruited formally 	<ul style="list-style-type: none"> Have the flexibility to choose a governance and administrative structure suitable for

<ul style="list-style-type: none"> • Manage the budget, compliance with regulations and reporting. • Build brand awareness, marketing, and communications. • Maintain membership records and ensure smooth operations. • Maintain digital platforms, including a centralized website, Zoom licenses, and others. • Deliver content marketing, including thought leadership. • Streamline offerings and only move forward with profitable programs. • Create revenue share opportunities for regions. • Pay dues to regions quarterly. 	<p>through an Open Call process.</p> <ul style="list-style-type: none"> • Receive dues from global center quarterly. • Manage their budget and plan to implement the Global Strategy • Have access to an IABC bank account in their local currency. • Pay for the technology stack needed to run IABC in its region if different from other regions and global center. • Deliver some “done-once” tasks critical for member and volunteer experience. • Provide oversight to communities in their region, ensure they have access to funds in local currency, and collaborate on member value delivery. • Execute marketing programs from global center to participate in revenue share. • Pay a staff member or association management firm to deliver administrative and financial support, freeing volunteer leaders to focus on strategy and member value. Regions can share resources as needed to leverage investment. 	<p>their size and scale. (Communities are not required to have a board but have the flexibility to have one if desired.)</p> <ul style="list-style-type: none"> • Communities can include special interest groups that are local or regional, including one for members at large. • Maintain their IABC identity and represent IABC on the ground. • Concentrate on networking and professional development. • Provide opportunities for volunteer recruitment. • Work with region to establish annual budget for their community and have access to funds in local currency. • Continue with local revenue streams. • Participate in revenue share programs from global center. • Relieved of any administrative and board governance burdens (boards, bank accounts, websites, tech stacks, etc.) that will now be carried by global center and regions.
---	--	--

The proposed model is designed to:

- **Align the organization in a way that IABC has never accomplished before by changing the composition of the international executive board.** The new model

proposes that each region has a representative on the International Executive Board – the body that has fiduciary duty and creates the strategic plan for IABC. Since each region will have representation in the creation and execution of the plan and oversight of the budget, alignment of the regions should come more naturally. The proposed composition of the board:

- Chair: one-year term
 - Past Chair: one-year term
 - Vice Chair: one-year term
 - Secretary/Treasurer: two-year term
 - Seven Region Past Chairs: one-year terms
 - Two directors-at-large: Three-year staggered terms
- **Create financial transparency so volunteer leaders have access to financial information at all levels of the organization to effectively manage resources and maximize member value.**
 - Change the composition of the International Finance Committee to include region treasurers, giving every region input into the international budget and financial health of IABC.
 - Have one bank account for each currency that IABC operates in. Region and chapter dues will be paid out quarterly. This will minimize foreign transaction fees and banking fees and it enables a financial management system where revenue and expense reporting can be rolled up on a worldwide basis -- giving leaders at all levels access to IABC financials and how their budget fits within the bigger picture.
 - Local communities become part of the regional budget, with monthly financial reporting to monitor how they are tracking. They will still have an annual budget and can continue with revenue generating programs within their community. To reduce their administrative burden and banking fees, the region will manage accounts receivable and payable out of central account in local currency.
 - **Improve the member experience.**
 - With region boards having a representative on the IEB and the Finance Committee, they will have a deeper understanding of international programs to promote and make them available to members.
 - Region boards will have the ability to make decisions on where growth opportunities are within their region and to invest accordingly to create member value.
 - Since region leaders are closer to communities and their members, they are better positioned to know what is needed to recruit and retain members in their geographic area and to ensure they are having a valuable and consistent IABC experience, irrespective of the community/ies they choose to join.
 - With region boards being strategic, they will need working committees to execute. This creates more strategic volunteer roles, as well as volunteer opportunities for members who want to grow their network beyond their local community.

- Revenue share is an important aspect of the proposed model. Regions and local communities can benefit from their support and promotion of IABC programs – making them available to members worldwide.
- **Improve the member-at-large experience.** In addition to the reasons listed above for members, the proposed model encourages members-at-large to join communities and get connected. It might be a community of MALs within their region or a special interest group. We know from IABC membership surveys that members who are connected stay with the association longer.
- **Lesson the burden of volunteer leaders and improve their experience.**
 - Having one bank account in each currency allows IABC to simplify and modernize money flow within the organization, reducing administrative burden. The proposed model envisages that each region and community have a line item on the budget, with monthly financial reporting to monitor how they are tracking against their budget. *(A global working group, headed by the IEB Treasurer is being formed and will work out the specifics for how vendors would be paid, how money would be received from local and regional events, and how communities will budget and access their funds, allowing for the complexities of each region. They will be looking at efficient ways to collect, budget, distribute, invest, and spend our members' dollars wisely and consistently across the organization.)*
 - Local volunteer leaders will be relieved of some of the administrative and board governance burdens. Community leaders will not have to maintain bank accounts and the associated paperwork, including annual tax reports, that accompanies them. They also won't have to maintain websites or tech stacks locally. These responsibilities will now be carried by the global center and regions.
 - If the chapter model does not work for a community, local leaders can form networking groups without a formal board, as well as local or regional shared interest groups. This level of freedom is intended to make recruiting volunteers and members easier and allow for groups to form, incubate -and eventually disband - as needed.

The proposed model flattens the IABC hierarchy and improves our ability to respond to market changes. It also modernizes our financial management system, allowing for online payment processing and e-commerce activities. Above all, it ensures we are poised to grow into the future by attracting and retaining members, and offering them valuable knowledge, experiences, and connections.

It requires the entire association to move forward collectively into the future.

Next steps

Three votes will be put to the vote at the 2023 Annual General Meeting.

See ***IABC Annual General Meeting & Delegate Voting: A Primer*** for a detailed explanation of IABC's bylaws and the proposed changes that will be put to the vote at the 2023 AGM.

Assuming an affirmative vote at the 2023 AGM the IEB will establish a second taskforce (Taskforce 2.0) that will be responsible for:

- Fine-tuning the operational details governance and structure further based on feedback from regions and chapters and presenting any bylaw changes for approval at the 2024 AGM.
- Exploring different types of financial operating models and collaborating with regions and chapters to develop appropriate approaches to address legal, regulatory, and fiscal obligations for each jurisdiction where IABC operates.
- Creating an implementation and change plan for the organization redesign based on the approved model and leading change communications.

See **Appendix IV** for the *Taskforce 2.0 Terms of Reference: '23/'24 Stronger Together IABC Organizational Taskforce Terms of Reference*.



APPENDIX I
Stronger Together
IABC Organizational Design Taskforce
Terms of Reference

Terms of Reference	
<p>Purpose & Responsibilities</p>	<p>The primary purpose of the <i>Stronger Together Taskforce</i> is to lead a review and redesign of IABC's organization structure and governance model to secure IABC's future.</p> <p>The board-level Taskforce will present a proposal for the redesign of IABC's Organization for approval at the 2023 Annual General Meeting (June).</p> <p>It is anticipated that there may be a need for interim or iterative changes to be made to IABC's By-laws to enable some agility and flexibility in how any ultimate change might be achieved constitutionally.</p> <p>The first responsibility of the Taskforce will be to work with the Secretary, International Executive Board to determine what, if any, changes must be put to the 2022 Annual General Meeting in New York, New York.</p> <p>The Taskforce will lead a review and listening process to:</p> <ul style="list-style-type: none"> • Understand the current structure and its effectiveness in: <ul style="list-style-type: none"> ○ Delivering member value ○ Providing a stable operational base for growth of IABC ○ Managing costs and risk ○ Supporting agility and responsiveness in a rapidly changing world • Engage with a broad cross-section of IABC stakeholders (past, present, and future) to co-design a new structure and governance model that has wide buy-in from key constituents. These stakeholders will include: <ul style="list-style-type: none"> ○ Members ○ Volunteer Leaders at Chapter, Region and International ○ Sponsors & business partners ○ Fellows • Recommend a preferred model (structure and governance) for a volunteer-led, not-for-profit, professional association.

	<ul style="list-style-type: none"> • Recommend an implementation program including a change management and stakeholder engagement plan.
Design Principles	<p>Redesigning any organisational structure is challenging and the following design principles will guide the work of the Taskforce:</p> <ul style="list-style-type: none"> • Design for today: Our structure must be appropriate for the size and scale of IABC today. • Design for growth: Our structure must support membership and revenue growth. • Design for speed: Our structure must enable us to become a more agile organization that can react quickly to market trends and opportunities. • Designed to enhance the member experience: Our structure must be designed with the member experience at its core.
Restructure Goals	<p>A successful restructure will deliver the following:</p> <ul style="list-style-type: none"> • Align with physical business size and budget (significantly smaller from five years ago) • Reduce complexity and costs and increase agility and relevance • Focus on what matters and increase member value • Reduce reliance on potentially fatigued volunteers • Reduce the number of International Committees and levels to strengthen a direct communications link from the bottom (member level) to the top (International Executive Board and Executive Committee) • Focus International Committee activities and resources towards revenue generation • Assess and eliminate poor performing or nonrevenue programs • Continue to reduce administration costs and increase efficiencies between chapters, regions and international • Look for cost savings with administration resources • Strengthen organization as integrated and stronger together • Strengthen organization’s commitment to Diversity, Equity & Inclusion • Setup resources to achieve digital and data transformation • Better define and serve “members at large”



APPENDIX II
Stronger Together
IABC Organizational Design Taskforce
Research & Discovery

Where work is done data capture

As part of the work of the Organization Design Taskforce, we undertook a review across IABC to understand where work is currently undertaken by volunteer leaders at: International, Region and Chapter level.

We set out to understand where work is undertaken by volunteer leaders or staff.

We asked volunteer leaders the following question in relation to each business function:

“Do you allocate resources (operational, volunteer, financial) to undertake this business function?”

Business Function	Definition
Financial Management	The practice of handling a company’s finances in a way that allows it to be successful and compliant with regulations. That takes both a high-level plan and boots-on-the-ground execution.
Sponsorship	Developing partnerships with organizations, companies, or industry partners that include monetary or in-kind support for IABC and benefit to the sponsor.
Brand, Marketing & Communications	Brand awareness, Program & Product Marketing, Stakeholder Communications & Engagement
Membership recruitment	Membership referrals and recruitment strategies to drive new member acquisition
Membership records	Single source of truth for members - current, past and (potentially) prospective
Membership Retention/Stewardship	Delivering value to members to increase retention and positive word of mouth
Awards & Recognition Program	Design, delivery and event management of Awards & Recognition programs that deliver member value e.g. Quills & Master Communicators
Professional Development & Networking Program	Design, delivery, and event management of professional development & networking programs to deliver member value

Business Function	Definition
GCCC Marketing	Active engagement with GCCC Marketing
Governance	Governance framework in place & managed
Strategy	Develop & implement strategic plans
Customer Relations	Manage customer interface & service inbound enquiries from members & other stakeholders
Digital Platforms	Maintain a website, social media platforms and / or digital communication platforms
Content Marketing	Content marketing including thought leadership
Volunteer recruitment & development	A program to recruit, develop & educate volunteers and volunteer leaders

Insights

Our findings showed variability across regions and chapters in where work is performed. We found sensible duplication of effort, opportunities to streamline as well as gaps where critical business functions aren't being performed.

We shared a series of recommendations, some of which pertain to structure and governance, and some that are about strategy and programs.

- Some business functions will need to be performed across the Global Center (G), Regions (R), and Communities (C).
- Others could be led by one of the three. We highlight in grey to show leadership
- All Business Functions should follow an agreed international standard and process to minimize risk, drive efficiency and deliver quality. These standards processes would be set at the Global Center.

Function	G	R	C	Comments
Financial Management	X	X		<p>We need a cutting-edge banking partner that will help us establish banking arrangements at the Global Center and in each Region.</p> <p>We need to overcome the going concern issue and ensure that membership monies are deployed to deliver value and grow membership.</p> <p>Could our banking arrangements help us reduce the need to move monies and incur costs?</p> <p>Would having one banking partner help us with credit and foreign exchange facilities?</p>

Function	G	R	C	Comments
Sponsorship	X	X	X	<p>The Global Center coordinates an IABC Standard for sponsorship engagement and contractual arrangements, but the Region is well placed to deliver value through a network of local markets.</p> <p>A key deliverable will be development of a guide to cover sponsorships and donations. Communities will probably focus more on in-kind donations with local vendors and suppliers. Regions and the Global Center will focus more on sponsorships and contracts that are regional, national, and global in nature.</p>
Brand, Marketing & Communications	X	X	X	
Membership recruitment	X	X	X	<p>The Global Center articulates the value proposition and manages global membership recruitment campaigns.</p> <p>Regions are best placed to understand the marketplace; the industries and organizations that employ professional communicators.</p> <p>Regions lead whole of geography membership recruitment, supporting and coordinating with local communities to attract new members.</p>
Membership records	X			Membership pipeline (lapsed and potential new members) needs to be centrally captured and shared with and between Regions and Communities.
Membership Retention & Stewardship	X	X	X	The Global Center designs a platform of programs that create member value, and the Regions ensure that there are no gaps in experience for members.
Awards & Recognition Program	X	X	X	<p>We must deliver excellence through awards and recognition programs that align to our global standard. The model of celebrating Gold Quill winners through regions (Silver Quill) or local chapters (Bronze Quill) could be extended to every region.</p> <p>We should look to build an international approach to individual recognition as well.</p>

Function	G	R	C	Comments
Professional Development & Networking Program	X	X	X	<p>A strategy driven approach to professional development should create opportunities to design and scale events as well as programs. To deliver leading content that builds our brand and reputation.</p> <p>We have a range of conferences running around the globe – an annual world conference, bi-annual regional conferences, and all-day local events. Each of these contribute to our brand and have the potential to deliver scalable and profitable revenue.</p> <p>We currently lack a mechanism for connecting the design and execution of our conferences that would enable a multi-year horizon view of programming. The potential of a more joined up approach could deliver more value for members, sponsors, and other stakeholders.</p>
GCCC Marketing	X	X	X	<p>As one of the key reputation and revenue programs for IABC, it is noteworthy that the marketing of GCCC is not undertaken in every region and chapter.</p> <p>The GCCC designs & delivers the program, including marketing tools. Regions can play a more significant role in marketing certification across their geography and in supporting their communities to take advantage of certification as a brand and revenue opportunity.</p> <p>The GCCC and Regions are well placed to work together to identify third parties the Council, with support from IABC, can contract with to sell certification in return for a revenue split.</p>
Governance	X			
Strategy	X			
Customer Relations	X	X	X	

Function	G	R	C	Comments
Digital Platforms	X	X	X	<p>We would benefit from having one digital technology stack with little duplication except perhaps with local community social media.</p> <p>In the interim we should identify opportunities to reduce or remove, the burden and expense of managing digital platforms by local communities.</p> <p>The websites must also provide self-service capabilities – enabling members to update personal/account information, online renewal, ordering products, registering for events and other revenue-generating programs.</p>
Content Marketing	X			Content marketing is key to building brand and reputation. It should be centrally delivered; offering members and volunteer leaders a platform to share thought leadership through IABC owned and earned channels at the center.
Volunteer recruitment & development	X	X	X	Leadership Institute – both in person and virtual - has been quite well received but reaches only a small percentage of the total leadership population. Region models, such as Canada's Dare to Lead should be considered for all geographies.

Third party research

In addition to IABC's own data and research the Taskforce reviewed a range of third-party research including:

- McKinley Advisors Association Viewpoint report
- Marketing General Incorporated (MGI) 2022 Association Economic Outlook Report
- Marketing General Incorporated (MGI) 2022 Membership Marketing Benchmarking Report
- Mariner Management & Marketing 2022 Chapter Performance & Benchmarking Report
- ASAE 2022 Board Brief

Associations

The Taskforce also considered governance models for a range of associations including:

- AMA
- IAP2: International Association for Public Participation

- Legal Marketing Association
- PRSA



APPENDIX III Stronger Together IABC Organizational Design Taskforce Feedback Review

Background

In 2021, the IABC introduced a new strategic plan to address the need to manage current and future challenges. In 2022, the IEB established a taskforce to examine what organizational structure and governance model would enable IABC to thrive and deliver on that strategy.

After drafting a proposed model, the taskforce met with stakeholders to get feedback and adjust the model. This paper outlines the feedback received and how it was incorporated into the final model.

Listening Sessions and Documents

- IEB Board meeting discussion and notes (July 2022)
- Listening session with Council of Regions (Jan 2023)
- Listening session with Southern Region (Feb 16, 2023)
- Listening session with EMENA Region (Feb 16, 2023)
- Listening session with Heritage Region (Feb 17, 2023)
- Listening session with Asia Pacific (Feb 20, 2023)
- Listening session with Africa Region (Feb 22, 2023)
- Listening session with Pacific Plains Region (PPR) (Feb 22, 2023)
- Africa Region Board feedback (Feb. 24, 2023)
- Listening session with Canada East Region (CER) (Feb 27, 2023)
- Email correspondence between Danielle Bond and Camilla Osborne (Feb 27, 2023)
- Listening session with Canada West Region (CWR) (March 1, 2023)
- Summary of feedback captured by Brad Whitworth from all Listening Sessions (V5, March 1, 2023)
- PPR Region Board feedback (March 3, 2023)
- Southern Region Board feedback (March 4, 2023)
- EMENA & APAC Boards combined feedback (March 4, 2023)
- Frequently Asked Questions (March 7, 2023)
- Discussion paper: Stronger Together IABC25 Organizational Model (March 18, 2023)
- Listening session with Large Chapter Leaders (March 20, 2023)
- CER Board feedback (March 21, 2023)
- Basecamp Correspondence with feedback on the proposed model from Michael Blackburn (Toronto) shared by Danielle Bond (March 23, 2023)
- Listening session with Medium Chapter Leaders (March 29, 2023)
- Listening session with International Committee Chairs & members (March 29, 2023)
- Listening session with Fellows and Former IEB chairs (March 30, 2023)
- Listening session with Asia Pacific Chapter Leaders (March 27, 2023)
- Listening session with Small Chapter Leaders (March 28, 2023)
- Letter from Toronto, BC, Calgary, and Edmonton (April 17, 2023)

- Basecamp Correspondence with feedback on the proposed model from members of the Council of Regions, the International Executive Board and the Taskforce (July 2022 to April 2023)

Feedback

Key Feedback Theme	What Was Said	How It Was Addressed
Clarity	<p>A desire for more clarity about the model.</p> <p>What will members be asked to vote on at the Annual General Meeting in June?</p> <p>If the detailed design and implementation of the new model will be the responsibility of a second Taskforce, can we get more information on what that work will entail including how we will be engaged in the design and change program?</p>	<ul style="list-style-type: none"> • Proposal paper expanded to give more clarity, including Appendices with further background information • IABC AGM & Delegate Voting Primer developed, outlining the voting process (governed by current Bylaws) and exactly what Bylaw changes will be brought for a vote. • Terms of Reference for second Taskforce drafted. • Timeline developed to demonstrate how future taskforce and workstreams could overlap during implementation.
Connectivity & consistency	<p>Broad support for sunsetting the Council of Regions and incorporating regional representation in the composition of the IEB and the International Finance Committee.</p> <p>Local connections are important, especially in large regions, how will the new model bring a greater consistency to the member experience across the globe?</p> <p>Many chapters are working well, what happens to them?</p>	<ul style="list-style-type: none"> • Clarification made in paper. <p>Enhanced member value will come from consistency of programs and delivery. Currently, all regions do not support or promote all IABC programs, giving members an inconsistent experience depending on where they live. Some region board members were not aware of the <i>Stronger Together</i> strategy. If a region doesn't promote and align with the strategy, their chapters and members remain unaware of those programs or opportunities.</p> <p>The new model has a member of each region board sitting on the IEB to shape new programs and achieve buy-in and alignment among all regions. The proposed model also anticipates revenue share</p>

		<p>opportunities so that regions and local communities can benefit from their support and promotion of IABC programs – making them available to members worldwide.</p> <p>The proposed model also allows a region board to make strategic decisions on where the growth opportunities are within their region and to invest accordingly. If a local community is struggling, the region can address the issue without unnecessary administrative or financial constraint.</p> <ul style="list-style-type: none"> • Communities can include formal chapters, informal networking groups, or shared interest groups. The proposed model encourages chapter boards to continue where appropriate, with a plan for reducing their administrative burden. In addition to chapters, local networking groups without a formal board may form, as well as local or regional shared interest groups. This level of freedom is intended to make recruiting volunteers and members easier and allow for groups to form, incubate, and disband as needed.
<p>Financial Model</p>	<p>A broad range of responses to strengthening the geographic oversight of finances. An acknowledgement that any solution may need to be tailored for different parts of the world. Benefits may differ between smaller chapters and regions compared to larger chapters and regions. We need more insight into how it would work in practice, including the impact on volunteer</p>	<ul style="list-style-type: none"> • Based on concerns voiced, a finance workstream has been formed immediately. This workstream is headed by IEB member, IABC Secretary /Treasurer Ann Marie Blake. It will include diverse representation of finance representatives from regions and chapters to discuss workflow and specifics on how the model should work and how it might be different in different regions. <p>The proposed model gives regions, chapters, and other</p>

	<p>leaders (Treasurers & Finance Directors), how it will improve efficiency and effectiveness and what it means in terms of autonomy and current financial arrangements.</p>	<p>local community groups a line item on the regional budget – with monthly financial reporting to monitor how they are tracking against budget. The workstream will work with regions and chapters to determine how to modernize the current process and to design the detailed approach.</p> <ul style="list-style-type: none"> • The model also proposes a consistent online global financial management model so that revenue and expense reporting can be rolled up on a worldwide basis. • Efficiencies are expected from minimizing foreign transaction fees and banking fees. IABC pays foreign transactions fees when dues are paid to chapters and regions every month in their local currency. These fees are paid for each transaction to all region and chapter bank accounts. The fees average 3% and add up over time. There are also banking fees for most accounts around the world. The proposed model suggests we consolidate bank accounts to one within each currency to minimize fees. It also recommends paying dues out to regions quarterly, once again minimizing foreign transaction fees. In addition, some chapters have “lost” access to their accounts because the person named as signatories on the account are no longer available. These funds are lost to member use.
<p>Terminology</p>	<p>The interchange and use of the words geography and regions was confusing and was used inconsistently.</p> <p>The term “Americas” was confusing because</p>	<ul style="list-style-type: none"> • In the revised proposed model, we have changed “Geography” to “Region.” • Instead of using the term “Americas,” the region names have been changed to US East and US West. Members at

	Canada is part of the Americas too.	Large in Latin America will be assigned a US region until membership grows to support a standalone Latin America region. Consideration for creating an IABC Latin America community to be explored.
Membership	<p>Paint me a picture of how the new model will improve our ability to deliver value to members and, in turn, improve attraction and retention of members.</p> <p>How do members at large fit in to the new model?</p>	<ul style="list-style-type: none"> The new model proposes that each region has a representative on the International Executive Board – the body that has fiduciary duty and creates the strategic plan for IABC. Since each region will have representation in the creation and execution of the plan and oversight of the budget, alignment of the regions should come more naturally. <p>Another key piece of the proposed model is having the regional treasurer serve on the International Financial Committee – giving every region access to the budget and financial health of IABC and the opportunity to contribute strategically to decisions affecting the financial health of the IABC.</p> <p>In addition, the plan gives more autonomy to the regions, enabling them to direct budget and tailor programs to their market. Since region leaders are closer to the members, they are in a better place to know what is needed to recruit and retain members – and to ensure members are having a consistent experience of IABC.</p> <p>This was the reason that the Africa region was brought back into the plan. Initially the task force recommended that Africa become part of the EMENA Region. Upon further reflection of their market, languages, currencies, and banking laws, it was clear this region needed to</p>

		<p>stand on its own.</p> <ul style="list-style-type: none"> • There will be more volunteer opportunities at the Region level. The board will have to be strategic in nature and committees will be needed to do the tactical work – giving members at large more volunteer opportunities from early in their career to more senior communicators. By creating these volunteer opportunities within the region, the plan is to actively engage more members-at-large. • At the local level, chapters with boards are encouraged to continue with the current model. However, for those struggling to maintain a board, the proposed model gives more flexibility to form informal groups or special interest groups. These groups can still receive funding for networking and professional development opportunities by working with their region board. This level of freedom is designed to make recruiting volunteers and members easier and allow form groups to form and incubate as needed. • Revenue share programs will also be developed so that regions and local communities can benefit financially by promoting international programs that are of interest to their market.
--	--	--



APPENDIX IV
'23/'24 Stronger Together
IABC Organizational Design Taskforce
Terms of Reference

Terms of Reference

<p>Purpose & Responsibilities</p>	<p>The primary purpose of the <i>'23/'24 Stronger Together Taskforce</i> is to continue to the work of the <i>'22/'23 Stronger Together Taskforce</i> by developing specific implementation recommendations in the areas of governance, finance and change management to deliver on the agreed operating model.</p> <p>The board-level Taskforce will present a proposal on specific changes for implementation to the International Executive Board and any bylaw updates initiated by the taskforce will be presented for approval at the 2024 Annual General Meeting (AGM).</p> <p>It is anticipated that some changes will be made to IABC's bylaws at the 2023 AGM that will lead to further changes recommended by the <i>'23/'24 taskforce</i>.</p> <p>The first responsibility of the Taskforce will be to understand the scope of the approved bylaw changes at the 2023 AGM.</p> <p>The Taskforce will focus on three areas (or workstreams) and may organize itself into work groups assigned to each workstream.</p> <p>Each working group must have strong geographic representation from Regions and large, medium and small Chapters. Co-creation and collaboration are essential guiding principles for the Taskforce's mandate, and critical to success.</p> <p>Area 1 – Governance The Taskforce will further hone the new governance model (continuing the work of the <i>'22/'23 taskforce</i>) that will inform changes to the bylaws and corresponding policies and procedures. This includes reviewing governance between Regions and Chapters, and the current voting model used for association matters.</p> <p>Area 2 – Finance The Taskforce will develop next steps for a networked financial model that complements and works in tandem with the governance changes. This includes conducting a financial review to determine overlap of revenue and expense programs across all levels, understanding the financial landscape across IABC, and working with Regions and Chapters to co-create a viable finance operating model that is fit for purpose.</p>
---------------------------------------	---

	<p>Area 3 – Change Communication Develop the strategy and tactical plan(s) for leveraging a variety of channels in communicating change to leaders and members. This includes collaborating with Region and Chapter leaders to understand and address concerns about short and long-term impact of proposed changes on their volunteers and on members.</p> <p>Resources and References</p> <ul style="list-style-type: none"> • ‘22/’23 Taskforce body of work: <ul style="list-style-type: none"> ○ Organizational Design TF Presentation ○ Executive Summary ○ Stronger Together FAQs ○ Collected Feedback from region and chapter meetings ○ “Where the work is done” analysis. • Continued engagement with a broad cross-section of IABC stakeholders (past, present, and future). These stakeholders will include: <ul style="list-style-type: none"> ○ Members ○ Volunteer Leaders at Chapter, Region and International ○ Sponsors & business partners ○ Fellows and Past Chairs
<p>Design Principles</p>	<p>The same design principles of the ‘22/’23 taskforce will apply to the work of the ‘23/’24 taskforce:</p> <ul style="list-style-type: none"> • Design for today: Our structure must be appropriate for the size and scale of IABC today. • Design for growth: Our structure must support membership and revenue growth. • Design for speed: Our structure must enable us to become a more agile organization that can react quickly to market trends and opportunities. • Designed to enhance the member experience: Our structure must be designed with the member experience at its core.
<p>Restructure Goals</p>	<p>A governance and operating model for the IABC’s future state will deliver the following:</p> <ul style="list-style-type: none"> • Align the business and business processes of the association with budget and resources • A common understanding among all volunteer leaders on the purpose and mission of the association and fiduciary obligations • Better define how the Organization Redesign serves members and volunteers • Clarify and align governance processes across all levels: International Regions, Chapters • A networked financial structure that ensures capacity, capability, solvency, and resiliency within the association • Reduce complexity and costs and increase agility and relevance

	<ul style="list-style-type: none"> • Focus on what matters and increase member value • Reduce reliance on potentially fatigued volunteers • Strengthen a direct communications link from the bottom (member level) to the top (International Executive Board and Executive Committee) • Continue to reduce administration costs and increase efficiencies across the volunteer leadership • Strengthen organization as integrated and stronger together • Strengthen organization's commitment to Diversity, Equity & Inclusion • Setup resources to achieve digital and data transformation
<p>Membership and Voting</p>	<p>The Taskforce will be appointed by the Chair of the International Executive Board in consultation with the International Executive Board. It will comprise 9 voting members and 1 non-voting member.</p> <ul style="list-style-type: none"> • 1 Chair (1-year commitment by the Chair of the 2022-2023 International Executive Board) • 1 IABC Secretary/Treasurer (Finance workstream lead) • 2 members of the 2022/2023 Taskforce • 4 members being current or former Regional and/or Chapter Leaders representing Canada, USA, EMENA, Asia Pacific and Africa. • 1 member being an experienced change management professional <p>Non-voting members:</p> <ul style="list-style-type: none"> • 1 Staff liaison, IABC's Executive Director (ex-officio)
<p>Meeting Frequency</p>	<p>The Taskforce shall meet monthly, at minimum, and provide regular reports to the Executive Committee on progress. Additional meetings may be required depending on the work of the Taskforce.</p>
<p>Quorum</p>	<p>51% of the committee members. In the event of a tie, the Chair will have the casting vote.</p>

Staff Resources	IABC Executive Director or Staff Liaison; relevant staff as appropriate and determined by the Executive Director for operational support of Taskforce activities.
Reporting	The Taskforce shall submit a quarterly report to the IEB on activities completed and in progress.
Date of Last Review	18 April 2023