



IABC British Columbia: Strategic Planning

Introduction

Currently the third largest chapter in the world, IABC British Columbia serves the province of British Columbia. While a large percentage of our members live in and around the city of Vancouver, we have members scattered all over the lower mainland and further afield which gives us unique challenges with regards to engaging and providing value to all our members. We also have a very diverse membership in terms of industries, career levels and professional development needs, and a large percentage of senior and corporate members. Our aim is to increase our membership base and nurture a sense of community while raising the profile of IABC/BC to its members, and positioning communications as a strategic function in every organization. We believe that we can do this by building relationships with current and prospective members, other organizations, businesses and post-secondary institutions, while providing engaging and meaningful professional development and networking opportunities to our members, volunteers, sponsors, partners and communications professionals.

Strategic Planning Process in British Columbia

Having an overall chapter plan has been a key practice for many years. We typically set a three-year strategic plan for the chapter overall, and then the board of Director's activities are split into portfolios which are basically areas of focus such as students, sponsorships, career development and membership. Traditionally, the chapter board develops the strategic plan for the chapter and their individual portfolios from scratch over two days in July and August, with the executive developing an executive plan concurrently. Coming into the 2018/2019 year, we decided to do things differently. We had many new directors joining the team, several of whom were brand new to IABC which was great for us from the perspective that a mix of longstanding members and new members gave us fresh ideas, and different viewpoints on what we should do, but it also meant that a lot of onboarding was required to get everyone up to speed. We were also faced with the potentially daunting task of creating a new three-year strategic plan for the chapter, as well as annual strategic plans for the portfolios. This was a lot of work to cram into a couple of days over the summer, so the executive developed a basic three-year strategic plan before the summer planning sessions.

Leading into the summer months, several research activities were undertaken to get a 360-degree view of the chapter, the local market, IABC at the regional and international levels and the general needs of communicators. These activities included a robust member survey, interviews with outgoing and incoming board members as well as past presidents of the chapter, IABC's #1720 strategy, and going through chapter archives to gain insights into past strategic plans, events held by the chapter, and other areas of operations. From all of this research, a draft strategic plan was created for the chapter ahead of the two summer planning sessions. With a draft plan in place, it meant that in the summer sessions we didn't have to start from scratch. We could go through each chapter goal and objectives, change them as necessary and then focus the bulk of our time on operationalising the plan by brainstorming tactics, sharing ideas and defining how we wanted to work together in the year ahead.

See **Work Sample #1** for a snapshot of the member survey results.

Chapter Goals and Objectives

Our vision is to grow our IABC/BC community, and create connections with members, prospective members, other organizations, businesses, communities and post-secondary institutions so that we thrive and grow in the city of Vancouver. Through this growth we can raise the profile of IABC, our members, and communications as a strategic leadership function. In alignment with the IABC pillars, our mission is to advance the profession, create connections locally and globally, and develop strategic communicators. We want to provide engaging and valuable learning and networking opportunities, that deliver value and fulfilling experiences for our members and volunteers while building relationships in the community. We also wanted to future proof the chapters operations and financial well-being by focusing on our business structure, systems, revenue streams, expenses and technology to best serve us now and going forward. We know that in order to keep advancing the profession we need to help our members to stay up to date with digital and technological advances.

IABC's vision, purpose and 1720 strategy heavily influenced our strategic plan, so the bulk of our goals and objectives are very closely aligned with IABC's. However, as a chapter, we also have our own unique needs and challenges to tackle in a competitive marketplace and a diverse membership.

Based on our chapter vision and mission, challenges, feedback and historical activities, as well as IABC's #1720 plan we created 5 goals that spanned the Chapter portfolios, and programming:

Goal 1 - Increase brand awareness and membership base.

Aligned with International pillar #1 Advance Profession

Goal 2 - Champion excellent chapter management

Goal 3 - Increase community engagement.

Aligned with International pillar #2 Create Connection

Goal 4 - Modernize + foster a culture of forward-thinking digital communicators.

Aligned with International pillar #3 Develop strategic communicators

Goal 5 - Provide engaging, relevant and valuable experiences to our members.

Aligned with International pillar #3 Develop strategic communicators

Operationalisation of the chapter goals

Ahead of the first session, all Directors were given resources including an ABC/BC Directors Onboarding Package, IABC101 presentation deck, 2017-2018 Member Survey Results presentation deck and the IABC/BC 2018-2021 draft strategic plan that had been created. These resources were intended to not only help the team prepare for the strategic planning sessions, but also provide them with useful resources that they could refer back to throughout the board year. The Directors were also given template documents for their draft strategic plans and budget. In the July planning session, we focused our brainstorming on some key areas that we felt were either extremely important to the chapter from a growth perspective or were areas that were more challenging and therefore needed collaborative input the most. These areas were membership, volunteers, students and newcomers, sponsors and partners, responding to changing landscape, what is new and emerging. Between the first and second session the Directors were tasked with developing their plans.

The chapter's three-year strategic plan formed the basis for these portfolio strategic plans, with the Director's developing their goals and objectives in direct correlation with the chapters overarching goals and objectives. In order to meet the goals and objectives in the chapter plan, the Directors have to have the same or very similar objectives that directly relate to their portfolio. This ensures that from the top down all of our goals and objectives were aligned, and we were all clear on what we were trying to achieve going forward. While this helped greatly with the operationalism of the chapter plan, it did come with some challenges because it meant that for every chapter level goal, we had a lot of objectives to meet, with many objectives spanning multiple portfolios such as member growth. See **Work Sample #3** for a portfolio strategic plan.

Budget

For the strategic planning sessions, there was no budget requirements except for venue and food costs which we kept low, and we asked a senior member experienced in strategic planning to facilitate the sessions for us. In terms of the annual budget for the chapter, and all of the portfolios, we used the previous years end of year financials as a basis for our budgets. This provided all of the directors, and the executive with a starting point to develop their budgets by providing them with previous costs for resources, venue spaces, catering and other things that they would likely need over the course of the year. These budgets were then adjusted to reflect key priorities such as events, and operational tools for the chapter where we knew some investment was needed. We were in a very healthy financial position because we had ended the previous year with a significant surplus that we could use to invest in key areas. With our 40th anniversary coming up we decided to keep some of the surplus aside for our anniversary activities and invest the rest back into the chapter and our members with reduced event pricing, operational tools and international speakers.

Across all of the portfolios, and chapter operations we budgeted \$109,595 in expenses and we forecasted that we could generate \$105,850 in revenues for the chapter. Our primary sources of revenue would be membership dues, Jobline, event registrations and sponsorships.

Chapter Operations

Alongside the integration of the Chapters strategic plan in the portfolio plans, we also invested in tools and resources that would better serve us now and in the future and enable us to do new things. These included a webinar tool, and creative software called Piktochart that the whole team could use. Following in the footsteps of the Canada Western Region we also started taking steps to modernize our financial operations which included making the transition from excel spreadsheets to Quickbooks and switching banks so that we could move away from cheque books to direct deposits for volunteer reimbursements and get a chapter credit card for large purchases.

Marketing and communications

In an attempt to increase member engagement, we took some steps to increase our communications in relation to our strategic plan in 2018. We wanted to increase communications to our members in 2018 so we created two infographics that we shared on our website and other digital channels; one to communicate our new chapter goals in a similar look and feel to IABC's #1720 graphic, and the other to share the highlights of the 2018 member survey. See **Work Sample #4** for the Chapter Goals Graphic.

Over the past couple of years', we have developed robust processes, templates and tools for all of our communications and marketing activities, and we leveraged these for all of our activities. This meant that all of the events and programs that we run, and content we provided was promoted across all of the IABC/BC channels as integrated campaigns. For example, our events were promoted across all channels, with consistent on brand creatives and messaging that drove traffic to a website event page which included a link to register.

Chapter programming

Our chapter strategic plan was integrated into everything that we did in 2018/2019 especially with regards to our programming. In the 2018 member survey, 36% of those surveyed telling us that the relevance of local BC chapter offerings is the main reason as to why they would or wouldn't renew their membership, and 51% stating that 'topic not of interest' was the biggest reason as to why they didn't attend local chapter events. From this it was clear that we needed to offer varied programming to suit members at different levels on topics that they were asking for which were leadership, digital marketing skills, emerging technologies, and strategic planning. As a result, these topics featured across our professional development events, speed mentoring sessions, student workshops, SIGS and Blog posts on our website. Based on the member survey, the chapter strategic plan and IABC's 17/20 strategic framework we put particular focus on areas of our programming that we felt were the biggest priorities such as professional development events, mentoring and career development. Alongside these core areas, we offered a mix of networking events, SIGS, and our local awards program called the Wave Awards.

Results

For the majority of our goals, we set specific measurable objectives that either spanned chapter programming as a whole or were focused to a particular portfolio. Some of these objectives were much easier to measure than others, but it meant that overall, we could track our progress. We reported out on our progress in a number of ways. From the beginning of the board year, the Directors complete a monthly board report to update the board on their progress against objectives, highlights in their portfolios and any challenges that they are facing. Halfway through the year we have a mid-year check in which is a mid-year report completed by all Directors to summarize their progress to date and whether or not they are on track with their objectives. It's a time to reflect on our strategic plans and whether we need to make any changes to our goals. For instance, our student's portfolio has a newcomer's component, but midway through the year it was apparent that we needed to focus our energies purely on students due to resourcing challenges. Finally, at the end of the year, all of the board members complete an end of year report. This serves two purposes for the Directors which are to firstly to report out on whether objectives were met and secondly to reflect on their experience as a Director. These end of year reports form the basis of the annual report out to our members.

See **Work Sample #5** for an end of year report



Budget

Against a budget of \$109,595 our expenses came in at roughly 1.4% over budget at \$111,154

We exceeded our revenue targets by 11% because we forecast that we could generate \$105,850 and our final revenues totalled \$117,827 giving us a net income of almost \$8k. This was primarily due to Jobline where job postings exceeded our revenue by over \$7k

Chapter Highlights

Goal 1 - Increase brand awareness and membership base.

In April 2019 we won IABC Member Month and achieved a 21% Member Growth Year on Year

Overall engagement on our social channels up by over 10% and subscribers to our Connect newsletter went up 13%

Goal 2 - Champion excellent chapter management

Achieved objectives to retain 100% of current sponsors and move one sponsor up a level. We also exceeded our targets to increase our sponsors and achieved a 100% increase in sponsors. We also made progress on modernizing the chapter by purchasing new tools and transitioning our financial operations. Satisfaction in volunteering and leadership experience up 11%

Goal 3 - Increase community engagement.

We met our overall goal of successfully carrying out a refreshed Gift of Communications program and helped 6 non-profits exceeding our objective to build relationships with 4-5 non-profits.

We increased Wave Award SAIL Award submissions by 80% against objective to increase them by 40%

- Fall Kick Off a huge hit
 - 61 attendees (45% uplift YoY)

Goal 4 - Modernize + foster a culture of forward-thinking digital communicators.

We set an objective to run events with a digital and tech focus and offered multiple events within the events, students, career development and SIGS portfolios. We also set an objective to provide educational content on the blog that featured digital practices which we did. Topics included podcasting and influencer marketing.

Goal 5 - Provide engaging, relevant and valuable experiences to our members.

We exceeded our objective to hold three student workshops with an average likelihood to recommend rating of 93.3% against a target of 90%. We also met our objectives to run 3 speed mentoring events although we had to cancel one at the last minute due to low registration numbers, and to double the number of certified members in BC.

We experimented with different topics, formats and times of day for professional development events.

Overall we had a great year, but the biggest challenge, and learning from setting a complex, and ambitious strategic plan was just the pure scale of goals and objectives. Although all of our goals and objectives were in line with existing chapter programming the volume of objectives and trying to offer something for all members put a lot of strain on volunteers. With so many objectives, across a 3 year time frame its also very challenging to report out about everything. Going into the 2019/2020 we have adjusted the strategic plan to essentially 'do less better' in order to avoid issues such as volunteer burn out which we experienced in 2018. So although we had a very successful year in many ways, we did fall victim to martyr syndrome and did not always pivot or adjust plans as we should have.

Work Samples

#1 Member Survey Highlights Infographic

#2 IABCBC 2018-2021 Strategic Plan

#3 Portfolio strategic plan

#4 IABC/BC Chapter Goals Graphic

#5 End of Year Report sample