

## Strategic Planning

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| <b>Chapter</b>   | IABC Ottawa, Large Chapter | <b>Chapter Board Term</b> | July 1 to June 30           |
| <b>Region</b>  | Canada East                | <b>Timeline</b>           | July 1, 2018 - Nov 15, 2019 |
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### 1. BACKGROUND AND CONTEXT

With over 200 members, IABC Ottawa brings together communications, marketing and creative professionals to develop skills, create connections, and learn about best practices in a welcoming, active and diverse community.

**Our Value:** IABC Ottawa focuses on connecting you with the people and insights you need to thrive in your career. Whether you are a communicator, marketer, or creative professional, we connect you to the opportunities, resources, people, and information you need to advance.

**Our Benefits:** Joining IABC Ottawa means you enjoy unparalleled access to events and programs that hone your strategic communication skills and expand your network with the following benefits: monthly professional development events, a Members Connect Mentorship Program, Free Monthly Member Meet Ups, Networking Nine Events, Professional Certification, Volunteer Opportunities and Jobline.

**Chapter History/Challenges:** Established in 1976, the Ottawa chapter of IABC has a rich history of striving for effective chapter management to benefit our members, community, and leaders. Despite stable finances and membership growing, we had a few challenges in the season that impacted doing everything to the degree that we would have liked, including: **1. Maintaining steady Board Member engagement & leveraging volunteers consistently across the season.** This included lack of effective cross-collaboration across portfolios, particularly MarComm and Professional Development. **2. Balancing member-only events that provide member value, while extending our reach to untapped audiences.**

### 2. OVERVIEW

Strategic planning and having an overall chapter plan to guide the Board each season has always been a key governance practice for IABC Ottawa. When the IABC1720 strategy was released, the pillars, refined vision, and purpose immediately resonated with the chapter and reflected our overarching goals. For the past three seasons the strategy has provided a strong framework to guide the chapter plan and helped us see more continuation between seasons. An annual plan review in the summer and building off the 1720 strategy has helped ensure continuation and that the strategy builds year over year with key learning, insight and considerations from past years making a more sustainable chapter. Being focused while agile was key as we recognized the small and big wins for the chapter and learn from our experience.

### 3. GOALS AND OBJECTIVES

IABC Ottawa considers the needs of our members, leaders, and community by aiming to run our chapter in an effective and responsible way. Our overall goal for planning was to establish a strategic plan that considered our members and provided the leaders of our chapter with a clear direction for the season while continuing to build on successes and lessons.

The objectives of our strategic planning activities for the chapter are:

- To develop a strategic plan that incorporates member input and monitor it throughout the season.
- To connect the local strategy to the overall IABC International framework and localize how we will advance the profession, create connection, and develop strategic communicators.
- For all board members to actively contribute to developing the strategy and take ownership for carrying it out throughout the season.
- To use the strategic plan to develop our budget so it is reflective of our priority areas.

### 4. BUDGET

Strategic planning did not have a designated budget, the only cost was the food provided at the strategy session, which was taken from our Board meeting budget (\$100 per meeting). There also was no direct revenue for the process. Despite this lack of direct budget, our efforts and the resulting direction led directly to the creation of an operational budget that reflected the priorities of the strategic plan.

### 5. IMPLEMENTATION ACTIVITIES

### *Strategy Alignment & Chapter Planning*

Strategic planning in the chapter begins before the season and the planning session even commences. The President, Vice President, Past President have built a close working relationship leading to ongoing talks throughout the season on what is working, challenges, and opportunities for the present and future. This working relationship means EVP is constantly getting insights to build into the next season.

As part of our chapter planning in the summer before the season starts there is a board orientation and team building event and then a strategy session. It has been found that doing an orientation and meet-the-board event is important for team building and helps new members feel more informed before jumping into the strategy session. Training on the purpose and vision of IABC, the history of the chapter, and the expectations for the work of leaders helps leaders align themselves for strategic discussions and planning. Additionally, members learn how to talk about the chapter and are more prepared to share the strategy with members.

The strategic planning session, led by the Board President, enables the chapter to dive deep into the strategy. The planning portion starts with refining focus areas/objectives to guide the chapter to align with the IABC1720 strategy. Then smaller groups break out and use the agreed upon framework to guide brainstorm discussions around “Must Do” goals for the season and respective KPIs. All feedback and planning is embedded in each board portfolio’s monthly report to keep activities and outcomes aligned (WS 2). Following the strategy session in both the 2018/19 and 2019/20 seasons, most portfolios held planning sessions with volunteers to confirm tactical plans for the season.

Using the 1720 framework we ensured that season plans reflected the challenges of past seasons, primarily in desire to do more activities than we were able to and to continue to increase leader engagement while continuing to put members at the core. The three pillars serve as the chapter’s overall direction and then focus areas for the season and specific portfolio goals bring it to life. The 2018-19 the strategic planning process identified three focus areas being defined for the chapter for the year, which are: Create Connections; Develop. Teach. Learn.; and Provide value for members (WS 2). In 2019-20 goals focus on sustaining the retention of new members and supporting room for additional growth (members and activities) for our chapter to build beyond the 1720 timeframe (WS 3).

Importantly, for the 2018-19 and 2019-20 seasons the incoming President did informal listening tours with members at events and during one-on-one coffee chats with members, leaders, and others in the community to learn what they are looking for in the chapter. All of this information, along with a member survey in the summer of 2019, was used to inform the strategy sessions. Some of the key takeaways from listening tour were that members want to connect with each other in small groups, volunteers enjoy the work they do but want to be more connected and do more on teams, events with practical takeaways are enjoyed most, and timely topics are valuable. One takeaway from the member survey (WS 1) was that there was a gap in terms of understanding the true tangible benefits of being a member.

### *Progressing the strategy to meet member needs*

Each season as we use the 1720 framework it gives us an opportunity to not only look at our goals but also the strategies we are using to work towards them. One activity that we worked on to connect members was the introduction of Special Interest Groups (SIGs) a few years ago. In the 2018-19 season it was observed that the SIGs had morphed more into another event with a speaker talking which was not the intention. Following a successful impromptu pre-2019 meet up for those attending World Conference, input from other chapters on their meet ups, and feedback that people did not understand what SIGs were, we introduced Member Meet Ups. Member Meet Ups address the same goal of the original SIGs, exclusive member event where in a small group setting members could connect on challenges and ideas. So far we have had more than six attendees at each meet up and have set them up to require little planning. This is one example of how we continue to advance the plan with members in mind.

From feedback in the member survey and board members feedback, in October 2019, we worked to re-vamp the “IABC Ottawa member value proposition” to quite literally visually align member benefits with the 1720 pillars (see Work Sample 4). As of November 2019, this text was being incorporated into our website, e-newsletter, and social media posts. We evolved from using text exactly from IABC 1720 to learning how to best adapt it for our members and needs. This will continue to be evaluated. The value proposition are heard at each IABC event whether it be

through print items or opening remarks. We want members and future members to understand value to them.

#### *Budget Planning*

Following the strategy session, we created a strategic budget to ensure the sustainability of the chapter and set our season up for success. Part of the preparation for creating the budget included meetings with board members, once the priority areas were defined to determine the needs in their portfolios, and then meeting together as a board to review and understand the budget. This helped ensure that we had budgeted for new activities. This also has been key when approaching challenges or decisions. Often the treasurer asks how something helps work towards our goals which helps either find a solution or to move on from an idea.

#### *Using strategic planning to identify solutions to challenges*

Being agile and adapting the strategy season was critical when challenges that required a change in course came up. The nature of volunteer work is that other priorities can arise for leaders, and in the past year we noticed more signs of burnout from our chapter leaders who were juggling multiple roles and health concerns among board members than in previous years. For example, we made the decision to put our podcast, The Voice, on hiatus in the middle of the 2018/19 when the volunteer host stepped down. We developed a plan to build a new podcast that would better serve the three pillars within the capacity of chapter volunteers. Over the remainder of the season we formed a podcast committee, did research and worked to find the right approach, and now we are successfully realigned to launch in 2020. The pillars helped remind us of the direction and allowed us to slow down to ensure we were working and providing value strategically.

For the past two seasons we struggled with event planning, and speaker selection leading us to be very late launching and promoting events. While we hosted strong events it was often at the cost of leaders having to put in extra last-minute effort into events. Through this we reminded ourselves of the strategy and focused on smaller events that provided real connections and helped develop strategic communicators (i.e. Agile lunch n' learn and Coding for Communicators). These events were valuable for attendees while also helping to boost revenue from less successful events. The strategy helped during the season and the lessons learned were key when selecting a new VP Professional Development to find a match for needed skills.

Continuous planning also happens through Board meetings and conversations on our Slack channels to support each other, make informed decisions, and connect all of the portfolios together has been key.

#### *Building components from international into our local strategy*

Having a strategy that aligns well with the international strategic pillars allowed for natural synergies between the benefits and services provided at the international level and those provided at the local levels. For example, IABC international offers awards programs while locally we have harnessed the opportunity to highlight those winners, providing additional value and recognition. Additionally, we naturally have looked at how to bring international value to the chapter in simple ways such as more promotion of Catalyst articles, getting international volunteers to talk at the chapter, promoting opportunities and having chapter leaders present at Leadership Institute. Overall the strategy helps connect the chapter more with IABC. The vision and purpose continue to shape both our activities and the messages that we use.

#### *Integrating strategy planning into professional development & member opportunities*

Chapter planning did not end at the session or with the strategic plan, there are regular conversations as we advance portfolio activities. We continuously look at how the pillars align with activities and opportunities within them. We strategically look at providing a good mix of workshop and panel events to ensure we develop strategic communicators while also having pure networking events to create connections (strategy adapted in September 2019 to add two new member benefits, Networking 9 and Member Meet Ups). For each event we look at why we would host that event and the value to our members. We target events to strategic communicators based on insights from the IABC 1720 strategy. In planning on how we could advance the profession we focused on hosting a certification exam in April 2019 and to support aht host an Info session and study sessions to go beyond just offering the exam. We continued this in October 2019 which has led to four certified members in Ottawa. When we looked at the three pillars, the board identified that a mentorship program would help advance all three pillars and developed a pilot program in 2018-19 with great success (7 mentee /mentor matches). Our value proposition (WS4) helps to show how our

different activities and offerings align with the pillars illustrating how we are integrating planning in our work.

**MEASUREMENT & RESULTS:** A look at the highlights and results of our strategic planning initiatives.

| Objective   | Results  |
|---|--|
| <p><b>To develop a strategic plan that incorporates member input and monitor it throughout the season.</b></p>  | <ul style="list-style-type: none"> <li>● In both seasons the EVP did an informal listening tour to learn from members and greater community about challenges/opportunities to inform the plan.</li> <li>● Conducted a member survey in Summer 2019 and received 64 responses; used data insights on members not understanding benefits and topics of interest in action plans for the season. (See WS 1)</li> <li>● Shared the listening tour insights and member survey results with the board to help lead the plan for both seasons. Used data to inform the plan.</li> <li>● Developed overall and portfolio specific goals for the 2018-19 and 2019-20 season that build from the IABC1720 pillars: (see WS 2 &amp; 3).</li> <li>● Mid-year strategy check-in to recognize where we were in January 2019, and adapt as needed (i.e. paused the Podcast) (See WS 2)</li> <li>● Regularly look at how we are advancing, connecting and developing.</li> </ul>   |
| <p>To connect the local strategy to the overall IABC International framework and localize how we will advance the profession, create connection, and develop strategic communicators.</p> | <ul style="list-style-type: none"> <li>● Created chapter specific value proposition that builds on international and benefits locally, tailored it to the pillars. (WS4)</li> <li>● Matched the member feedback heard during local listening tours to the IABC International framework.</li> <li>● Use the framework to build our plan and to evaluate activities regularly.</li> </ul>  |
| <p><b>For all board members to actively contribute to developing the strategy and take ownership for carrying it out throughout the season.</b></p>                                       | <ul style="list-style-type: none"> <li>● Obtained buy-in from full board to localizing the IABC international framework.</li> <li>● Both seasons, hosted an orientation to welcome board members and share IABC knowledge with them so they could be prepared for strategy session.</li> <li>● In both seasons had an active strategy session for ideas and reflection to create meaningful goals for which Board members felt accountable.</li> <li>● Reformatted Board reports to engage in regular discussions with leaders about strategic directions and how activities connect with the overall vision.</li> <li>● Continue to meet monthly with the Board to discuss strategy and head off any challenges through both seasons.</li> <li>● After creating more Board-specific goals in 2018-19, leaders were able to deliver on 80% of the portfolio goals. Observed greater ownership and engagement throughout the course of the year by almost every portfolio.</li> <li>● In January 2019 did a strategy check-in to recognize what we accomplished, remind where we are going and reignite leaders. (WS2)</li> </ul> |
| <p><b>To use the strategic plan to develop our budget so it is reflective of our priority areas</b></p>   | <ul style="list-style-type: none"> <li>● For planning, we held a 30-minute budget discussion at the Board meeting to review the proposed budget, teach board members their financial responsibilities, and discuss processes to build financial literacy. (WS 5)</li> <li>● We had a goal of investing in membership and increased the budget in 2018-19 by \$1000.00 to be able to provide more member collateral, events and mail-outs. It helped with member retention and growth so it remained \$2400 in 2019-20, about 14.3% of budget. This strategic budgeting ensured we could invest and deliver in priority areas while breaking even.</li> </ul>   |

