



Chapter Management Awards 2019 - IABC British Columbia: Volunteer Engagement & Leadership Development

Introduction

With 430 members, BC is the fourth largest IABC chapter in the world, serving the entire province of British Columbia. Our goal is to be the preferred organization for communication professionals within British Columbia by bringing like-minded individuals together to connect, inspire, share and learn from one another.

As a large chapter, we have steered this ship with a sizeable working board, governing the activities of our volunteers, for many years. Our board has ranged from 12 – 16 people in recent years and, from there, each portfolio director on the board oversees their own volunteer committees or individual volunteers as required, based on strategic projects.

Historically, we have governed each portfolio with a director at the helm, supported by lower level, on-the-ground volunteers, as needed. The challenge with this approach is that the amount of ‘hands-on’ work at the director level can lead to frustration, high stress, burn-out and ultimately board turnover, which is a risk to our long-term succession planning. To this end, this was very much the story that we heard when we surveyed our board members about their volunteer experience. Reviewing the results of two years of these surveys, we saw through anecdotal, the direct link between directors taking on too much hands-on responsibility, and eventual turnover. With this in mind, it was clear that our challenge lay in coaching directors to be empowered directors, as opposed to a culture of martyrdom among our volunteers. High burnout and volunteer turnover (particularly in trying to maintain a stable vice president pipeline) was becoming the new normal. It was time to assess the board experience overall.

Operational Changes

In 2016-2017 we conducted some discovery work with other Past Presidents and senior members of our chapter around governance, while simultaneously talking to other large chapters (Edmonton, Calgary and Toronto) about how they governed their teams. It became clear that a two-tiered approach had tremendous benefit, both in terms of alleviating board workload and offering some “non-board” roles with a bit more meat to them, which volunteers could sink their teeth into. This could also help to combat an unfortunate stigma associated with being on a board– that it’s a lot of time to commit. The vision behind splitting up portfolios into more manageable roles was to help with volunteer retention over time.

Board Structure

For 2017-18, we restructured the board in a number of ways, centralizing our Marketing & Communications activities (including Digital) into one portfolio, and centralizing our Events portfolios (formerly Networking and Professional Development), conversely, we split out two of the former Career Development functions of Special Interest Groups and Students & New Communicators into their own distinct portfolios to create focus and dedicated leadership at the Board level in these areas – which were strategic areas we wanted to invest in for growth of the chapter.

Board Advisor Role

While we ran a successful recruitment campaign, leading to a nearly full board slate to start the year, this came on the heels of high turnover overall from the previous year. What’s more, many of our new board



members were green (new to the board). Our Vice President role was also still vacant so, at the Executive level, it was necessary to add an extra arm to strengthen the leadership of the board.

In response to this, wanting to increase our capacity in the area of strategy and leadership, we appointed a senior chapter member, ABC, and past president to serve as our board advisor. This person joined the executive level of the board and attended all board meetings including exec check-ins. They additionally supported the board buddy program by coaching some of our board toward fulfilling their strategies. Their senior experience at the board meetings helped elevate our discussions and was an asset to the larger board as a resource to any portfolio throughout the year.

Board Buddy Program

In 2017/2018, we continued our board buddy program, pairing directors with members of the executive board to support them in their professional development, and to ensure strong linkages between portfolio activities, and overall chapter strategy.

Portfolio Manager Program

In 2017 – 2018, as a result of our discovery work, we launched our pilot year of a two-tiered chapter leadership structure, where Portfolio Managers (PMs) were recruited to support the board of directors as in the execution of their strategy. So our open call for board recruitment in the spring 2017 period included reference to manager roles that the directors would work with as part of their team so that no one was leading solo.

These portfolio manager roles were not at the board level but the hope was that they would encourage longer-term volunteering by offering more manageable volunteer commitments with a degree of leadership experience while reducing the workload for board members. We profiled these roles throughout the year by keeping the information on our website, as we now do with board recruitment.

Having less work spread out between more people was a key need for our longevity and succession planning. The Lazy Leader concept is not an overnight switch in chapter operations, and the evolution of the portfolio manager program is the start of that, so future leadership can continue to build on this and create smaller opportunities.

Some key highlights:

- We initially recruited for 20 portfolio managers (PM) across board portfolio areas.
- We filled approximately 12 positions, achieving about 60% recruitment (not all positions were necessarily filled concurrently).
- Two PM roles stepped up to board level, following board vacancies, in both our students & new communicators and special interest groups portfolios.
- Some other PM roles were strong pillars of support to their areas of the chapter – proving a successful model when roles are filled with suitable candidates. For example, our manager of mentorship program, supported the career development portfolio to pilot a new mentorship program for the chapter.

Our challenges:

- The primary challenge was our inability to recruit for all the roles simultaneously, for a variety of reasons (specific to each area); for example, lack of interest in roles for some portfolios or some roles needed further clarity to understand the scope of their roles and thus appeal to suitable candidates.
- We also had some turnover with portfolio managers in the year that hindered some planning, as directors were reliant on having said resources in order to deliver and not able to do all the work on their own in lieu of role vacancies.



- In principal, this program is useful and supports increased succession planning for chapter leadership based on this year's results. Continued development is recommended to find the recruitment and retention model that is best for our chapter.

2-year Board Term bylaw change

Another challenge for us historically had been that our board members only commit to one-year Board terms, with option of continuing in another term if they choose. Due to the nature of volunteering and the varying quality of handover/archiving of previous years' work, recruiting volunteers and planning timelines it often meant that it took directors several months to really find their feet in their roles.

The term commitment was highlighted in the board nomination process, to ensure acknowledgement of all nominees and manage their expectations early (prior to ratification of the proposed change).

At the 2017 AGM, we ratified a change in our Bylaws stating that new Board members would now serve a two-year term, instead of the former one-year term. This change supported continuity between board years and based on the proposed slate for next term in 2018-19, all Board members who were expected to return did stay on.

Onboarding and Development

Knowledge transfer is a crucial element of onboarding new board members. We use our May board meeting (last one before our AGM) as a transitional board meeting, by inviting our incoming board members to join. It gives the new directors an opportunity to experience a board meeting by observing the final board meeting of the year. Although the incoming board members are not officially voted in until the AGM in June, we invite everyone based on the assumption that the proposed slate will be ratified at the AGM.

The May board meeting is split into two parts:

1. A condensed version of our regular board meeting, to conduct official business, as needed.
2. Dedicated facetime for outgoing and incoming directors to discuss their respective portfolios.
 - a. Both the incoming and outgoing directors are provided with one-page handover checklists to work through. This list includes things like:
 - i. Orienting the incoming members to your Google Drive account and archives for the portfolio
 - ii. Overview of the Chapter Milestone Calendar, with respect to your role
 - iii. Basecamp orientation – our internal chapter communication tool, to help transition between years and knowledge transfer (i.e. historical planning, etc)

Orientation and onboarding of new Directors continues after the AGM, and before the first summer strategic planning session.

In advance of our first of two strategic planning sessions, a number of pre-meeting reading materials were provided. Then, in person, we further spoke to a number of them to highlight important areas of operation, etc. Resources shared in the 2017/2018 planning sessions included:

- **Board Handbook** (see appendix 1) – operations manual that outlines our operating procedures (eg. our virtual office services: Office Suites, Acton Accounting, our bylaws, role descriptions, decision making accountabilities, an overview of how our chapter fits in the bigger IABC picture from Chapter to Region, and International (IABC)).
- **Planning Resource Tip Sheet** - helpful links and resources for all IABC leaders – including the Leader Center, Winning CMA entries, the #1720 Strategic Plan and pillars, etc.



- **Board Year 'At A Glance'** providing a quick overview of known program/ events and key date as part of our annual offerings to help inform the new board, that are consistent between years.
- **Budget** – Annual budget from past year as a reference
- **Sponsor Summary** – Overview who our sponsors are and what they do for our chapter

At the same session (first one of two), we discussed higher-level planning topics, and we also dedicated about one hour in the full day agenda for covering operational briefings like our financial processes, administration processes, and next steps include board meeting dates, locations, and what's expected leading up to each board meeting.

Chapter Strategic Planning

In the BC Chapter we work from a three-year strategic plan, and 2017 - 2018 was the third year of the plan set back in 2015. Leading into the 2017 - 2018 board year we ran our annual member survey, which helps inform our plans for the year ahead.

In July and August 2017, we held two strategic planning sessions for the whole board. The first session was a full day facilitated session, and the second was a shorter evening session designed for presenting, sharing, and discussing plans before approval and implementation. An external facilitator was hired for our July session to help us to brainstorm and map out our plans. Then between the July session and the August session the team had 3-4 weeks to create the strategic plans, and proposed budgets for their portfolios to support the chapters overall goals. They were also asked to prepare a presentation to share to the rest of the board for discussion and input. These plans and budgets were also reviewed by the executive team.

Following the second planning session in August, the plans were approved before commencing the year, in September. Approval of portfolio - and the overall chapter's budget was then proposed to the full board slate at the September Board meeting and approved.

Volunteer Recruitment

At the board level, the director and executive level roles are outlined in a board accountabilities document which outlines the overarching responsibilities of every board member as well as the individual responsibilities of each director and member of the executive. The nominations for the board slate go to our Past President who supports the incoming president by bringing together the nomination committee and chairing the discussion to determine who is the best candidate for each board role.

A separate accountabilities document (see appendix 2) was created for the portfolio managers, listing all of the different manager level roles available for each portfolio and the responsibilities of each role. Any other volunteer roles, once identified, are started with a role description identifying what area of the chapter it is for, who they report to, and how much time is required, etc.

Our volunteer services portfolio then collects the applications for roles outside the board level, and filters them to the appropriate board member for a phone or in-person interview. Once a volunteer is identified as a fit and agrees to the role, we onboard them to their area.





Communications + Marketing Plans

Board Recruitment

The communications and marketing activities began in January and ran until approximately April/May. The recruitment checklist (see appendix 3) provides a view of our activities to promote the board recruitment.

The communication plan for recruitment included all of our channels from website content, to blog posts, video content, targeted emails to members, featuring in our Connect email newsletter, social media promotions, testimonials from past and outgoing board members – why they volunteered at the Board level, and verbal promotions at chapter events.

All of the digital marketing and communication activities drove interested members back to the website - primarily the [Join Our Board](#) page. This page is where we provided a link to our online nomination form which included key dates that the newly appointed board members would need to be available for, including attending *Dare to Lead*, summer strategic planning sessions, our closing board meeting before the AGM where transition/handover between board terms begins, and of course our annual Chapter Wave Awards + AGM. This was done to ensure that expectations were set straight away, to ensure their availability, and potential directors had an opportunity to flag if any of these dates were not possible for them due to any prior commitments.

General volunteer recruitment

All open volunteer roles are listed on a [volunteer opportunities page](#) on our website, and promoted in our bi-weekly newsletter. Where we have roles that we really need to fill - or are fairly unique opportunities we also promoted them on social channels as needed. The board were also encouraged to promote volunteer roles, particularly for their own portfolios, through their individual networks. Depending on the role we also might ask other senior members if they know of a suitable candidate, and we use networking events and our *Get Connected* (membership / IABC 101) events as volunteer lead-generation opportunities as we promote getting involved in the chapter there too.

Lazy Leaders

With our portfolio manager recruitment program we feel that we were slightly ahead of the curve in trying to reduce the issues of martyr syndrome and reduce burn out, but we know that this concept will take time to evolve further. It's a big shift for our chapter to move to increasing smaller roles or five-minute volunteer opportunities. We did start to look at this, with the directors at a Board meeting, by doing an exercise with them to start identifying smaller roles and tasks that they can delegate or outsource for. We were unable to move this forward and map this all out afterwards; unfortunately, due to capacity issues and a lack of focus on this over other priorities.

Volunteer Engagement

We believe that investing in our volunteers and leadership is crucial to the longevity of our chapter, not only for morale but also for knowledge transfer and general reputation of chapter volunteer experiences. In 2017-2018 we used a number of tactic to recognize and reward the team.





Board Level Volunteers

Leadership Development

At the board level, we try to send all of the directors to the annual Dare to Lead conference hosted by CWR. We were fortunate that it was hosted in Vancouver in May 2017 so we were able to invite the whole team. Not everyone was able (due to prior commitments) to come for the whole event, but it was a great learning opportunity for all.

We also sent two members of the executive board to Leadership Institute (LI) to give them opportunities to connect with IABC and leaders at a global scale. The directors were encouraged to follow the action on social and connect with their peers virtually. This experience proved foundational in injecting world-class leadership techniques into our chapter strategies (including the previously mentioned lazy leader exercise we conducted at the next board meeting following LI).

Complementary Events

Networking events are an important aspect of our programming, and a great opportunity for our Board members to meet our members, while also acting as brand ambassadors for the chapter so we give them complimentary admission to all of these events which include our Fall Kick Off, Summer Kick Off, Holiday Social, Signature Storytelling event and our annual Wave Awards. Although this can be a large expense by the end of the year, it's important that they are encouraged to come out to social events, be part of the fun, and it's part of how we recognize Board members for investing their time in our chapter.

We also held two social events for the Board members, once at mid-year in January and once at year-end to conclude the year in June. Both of these events were a casual social event based on preference of the majority and their schedules. We cover the cost of the evening to say thank you for their hard work.

The volunteer director also organised a 'volunteer recognition' social event for all of our volunteers at all levels. Whether volunteers can join or not, due to availability, they often comment in appreciation of the gesture.

Thank you cards and gifts

This year we added in branded IABC/BC note cards, which were given to all of the board members to use for their teams. Everyone was encouraged to recognize their team by saying thank you more often, as part of our efforts to appreciate volunteers and all that they do to make our chapter programs possible.

We also gave a branded umbrella to all of the board members and our speakers to say thank you for their contributions to the chapter.

Kudos

We introduced Kudos at the board level as a way of celebrating successes - both IABC related and personal. These varied from Happy Birthdays and congratulations for passing exams to wins within portfolios, i.e. personal, work, and IABC related kudos.

We set up kudos in two ways; at the end of every board meeting and virtually through a dedicated thread on Basecamp.

Key Learning for us has been that with the addition of our Managers program, we also need to identify ways to recognize and reward this group of volunteers as well.



Wave Awards

This year we decided to change our volunteer award categories to make Board members not eligible for nomination. This was because winners in past years were primarily all board members which was a discouraging pattern as it communicated that only board members are recognized for their contributions. We wanted to incentivise other volunteers to become involved, and also ensure that all volunteers had a chance to be recognized.

This change was received positively and we saw an increase in overall nominations but the Volunteer categories only received a modest number of nominations, and not as many as we hoped. We learned that the categories need to be re-evaluated in the future to help open the nomination process to increase volunteer nominations further.

We decided that it was still important to recognize the board members at the event so we created a Certificate of Appreciation for them, signed by the Vice President, President, and Past President. This was designed on brand by our creative sponsor, framed, and presented to each of the directors in a short ceremony as part of the Wave Awards presentation.

We also use the Wave Awards as a way of profiling some of our volunteers as the nominees and winners of the awards are profiled on our website and social channels.

Measurement

We increased our overall chapter volunteer numbers by about 8% YOY between 2016-17 to 2017-18
Board experience (mid-year) survey results

2016-17: We started a Board experience survey in January for the first time to help benchmark the board-level experience, and we had 5 of 10 eligible board members respond (i.e. not the President level roles) and on a scale of 1-5 rating their board experience satisfaction, three out of five responded with a score of 3 (Good), the rest were lower.

2017-18: Although we didn't see an increase in survey responses as only 5 of 11 board members filled in the survey, we did see an improvement in the answer to the same question as three rated a score of Good, 1 rated as Excellent, and 1 rated as average.

Goal: Retain 100% of board of directors

We achieved 73% of this goal, due to three board member turnovers in the year: two were due to moving out of province, and one due to early realization that the role was no longer fitting for them. The roles did not remain vacant for long in either scenario, where the portfolio manager program helped us navigate these resignations efficiently because in two instances a portfolio manager stepped up to take on the Director level position.

Goal: Deliver a dynamic volunteer program that attracts and retains the right kind of volunteers (providing high-value fulfilling experiences)

Based on the Board experience survey results noted above, we viewed this as an increase in board satisfaction over the previous year; and supported this goal as a measure of success.

With a majority of the board slate in their first year of a two-year term, they were all invited to apply for their current role or a new role by the incoming President, based on performance and suitability for



proposed changes in the next year's board slate plan. Each who was expected to return, did so and nominated themselves for completing the second year of their.

Additionally, some of the portfolio managers, and other volunteers also wanted to continue volunteering.

Overall, the changes we made in 2017/2018 had a positive impact on volunteer engagement, retention, and our chapter leadership development. The challenges we experienced, like board turnover, or portfolio manager recruitment, were ones we could mitigate or work around and provided great insights for the year ahead.

See Enclosed Appendixes:

1. *Board Handbook (for Onboarding board members as a resource)*
2. *Board accountabilities document (For recruitment and setting expectations)*
3. *VP recruitment checklist for a quick view at our promotion activities behind the board recruitment open call*
4. *Executive Plan (I think we can add in budget to this as part of the plan overview for one document)*
5. *Certificate of Appreciation image / Board photo at Wave Awards*

