



CHAPTER	IABC Ottawa
REGION	Canada East
CHAPTER BOARD TERM	July 1 to June 30
TIMELINE	July 1, 2017 to November 15, 2018
DIVISION CATEGORY	Division 2: Medium Chapter (76 to 200 members)
CHAPTER CONTACT	Kaleigh Maclaren, Past President 613-222-6680 kaleigh.maclaren@gmail.com

1. BACKGROUND AND CONTEXT

IABC Ottawa connects nearly 200 members and the greater Ottawa marketing, communication and creative community to learn about best practices, develop skills, create connections, and access resources in a welcoming community. 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. Our focus is on retaining members, growing chapter leaders, connecting to IABC beyond Ottawa and having a sustainable chapter. We work to help chapter members grow in their careers by providing them with the skills and connections to succeed in their jobs. IABC Ottawa creates interest in membership through a diverse slate of focused quality events, workshops, special interest groups and professional development opportunities. We also create innovative communications content, such as our popular podcast “The Voice”, available around the world. The Voice helps listeners keep on top of the industry’s hottest topics at both the local and international level.

Chapter History/Challenges

Despite stable finances and membership becoming more stable this year we had a number of challenges in the season that impacted doing everything to the degree that we would have liked. Three of these challenges include getting our website hacked, seeing diverse interest and value in our events but smaller audiences creating a need to adapt logistics and a number of leaders as well as volunteers experienced significant work, and personal challenges. The nature of volunteer work is that other priorities can arise for leaders, in the past year we noticed more signs of burnout from our chapter leaders who were juggling multiple roles in their jobs and health concerns among board members than in previous years. This meant leaders were turning to the support of the community more and that as Board members we needed to consider how we could support our community, which was not a main goal of the original strategy. Acknowledging the small wins and focusing on what we could do well to advance the chapter strategy was important. To sustain and develop the chapter, we continue to ensure that we focus on the things we do well, achieve our goals, and deliver the most value to our members.

2. OVERVIEW

IABC Ottawa connects members with a range of opportunities including the chance to grow in their careers and develop skills through volunteer leadership roles. Our Board members and volunteers are a critical component in helping us achieve the chapter’s vision as they act as brand ambassadors in our community and are responsible for making our vibrant chapter run. With this in mind, we strive to make each role an enriching experience as opposed to simply completing tasks.

The diverse and supportive IABC culture is evident throughout the IABC Ottawa community and most notably within the volunteer sphere. We strive to have a Board composed of senior communicators, mid- career and young professionals as well as students working together. To



better support and engage our growing membership, a number of the board Vice President roles are shared by two people and most are supported by a group of directors. This approach, with shared workload and a group of volunteer directors, is a key strategy that helps us overcome volunteer retention and succession planning challenges.

Two of IABC Ottawa's strategic pillars, "advance profession" and "develop strategic communicators" focus on communication as a leadership function and creating more opportunities for communicators to develop leadership skills. In order to implement our leadership strategy, we dedicated financial resources in our budget to training and development opportunities.

3. GOALS & OBJECTIVES

The overarching goal for leadership development is to advance our profession by developing strategic communicators. The following objectives were set to help us achieve our goal of inspiring our leaders by providing a valuable development opportunity:

- Recruit and retain Board members going into the 2018-2019 season.
- Align new and returning Board members and volunteers with the chapter's strategy.
- Position Board members to thrive in their roles by offering at least two professional development opportunities and financial support to a few individuals to attend Leadership Institute.
- To celebrate and recognize volunteers by having ten outstanding volunteers of the month and one volunteer of the year.
- To provide a face to face connection between volunteers and board members.

4. BUDGET

Leadership development is a focus area for the chapter as we want to develop our leaders and our chapter sustainability depends on strong leadership. In our strategic budget planning we invested over \$4000.00 in leadership activities over the past year and a half. These activities include: board and volunteer meals, professional development sessions for board members (\$500), leadership institute, board member's tickets to events. There is no direct revenue from leadership development but that volunteers run the chapter!

5. IMPLEMENTATION ACTIVITIES

Strategic Planning

Each year the IABC Ottawa Board holds a strategic planning session over the summer to plan for the upcoming season and set an overall strategy. These sessions are led by the President and each year it evolves to fit the needs of the Board. In both 2017/2018 2018/19 seasons we hosted a Board orientation session that focused on learning about IABC locally, regionally, and internationally as well as teambuilding activities. This session was valuable for both new and returning members and satisfied their need for learning more about IABC beyond the local chapter. The presentation and supporting documents, including an IABC 101 Terminology Guide, were made available on the chapter Dropbox and Slack channel for members to review on their own.

In both seasons we hosted a strategic planning session for the season. The strategy session started with a recap of the orientation session and an activity to remind Board members that they are valued IABC members. Hosting the orientation as a separate session enabled us to dive deeper into the strategy. The planning portion started with refining focus areas/objectives to guide the chapter and support aligning the chapter strategy with the IABC1720 strategy. With the framework as guidance in smaller groups using flipchart paper put up around the room everyone brainstormed what we would do in the difference portfolios to advance the pillars. This strategy



meant all board members could contribute to the ideas and planning of the season within their portfolio and others. For instance, what type of PD events they'd like to happen that season, or what leadership development training they'd like to have as a board member.

Following the strategy session, most portfolios held planning sessions with their Directors to confirm tactical plans for the season. The Board's VP Finance talked each year with each portfolio team, to discuss budget needs to carry out their strategy before turning to budget planning with all board members.

Board members are responsible for attending monthly meetings, contributing agenda items, and reporting on the progress and achievements of their portfolios. Full reports are uploaded in advance of the meeting (outlining what has been done, in progress items, new agenda items, and questions) and each member is responsible for reviewing all reports in advance. We also added a new briefing template in the 2017/2018 season to deal with larger decisions that require a discussion or a vote. This was an effort to centralize information for informed and efficient decision-making. This new process also helps ensure that Board discussions are kept at a strategic level and key updates on each portfolio connect to the overall strategy. For each meeting, there also is always one agenda item that focuses on a specific strategic challenge to ensure strategic discussions take place. Between Board meetings members are active on Slack channels and meet for coffee to discuss any tactics and goals that overlap.

Volunteer Recruitment

As a volunteer-run association, IABC Ottawa's success is wholly dependent on the recruitment and retention of highly engaged individuals.

General Volunteer Recruitment Process

Volunteer needs are identified early in the season and board members are responsible for working with the VP of Leadership Development to develop job descriptions for all roles. IABC Ottawa primarily recruits volunteers online and through word-of-mouth. We find that more senior or longer-term members who are interested in volunteering reach out directly to find a role they can contribute in while newer volunteers use a volunteer form or volunteer email address. We receive interest from volunteers on a weekly basis. The Board has identified professional development and networking events as a key opportunity to gauge the interest of attendees in contributing to IABC through volunteerism.

Applicants that meet the needs of a specific available role receive an orientation by the VP of Leadership Development to share the details of the chapter's volunteering structure and culture, and identify the best potential role for the applicant. The VP leading the portfolio then assesses the candidate for fit, skills, and the unique needs of the role. This approach helps our leaders to gain experience in the hiring process.

Previously (up to May 2018) we had a volunteer Facebook page where volunteers would get news and information on chapter opportunities. We have migrated from using that to centralizing all of our internal chapter communications to Slack. There is now a Slack channel for volunteers where the VP Leadership Development posts opportunities regularly. This is a great way to attract volunteers for micro volunteer roles such as helping at an event, with event prep, mailing out member gifts, editing Chapter Management Awards etc. as we try to develop more smaller opportunities for contributing. In the 2018/19 season we have seen more and more volunteers starting to do "micro" roles outside their normal positions, whether it is simply to help out another volunteer, or to gain experience in a certain area. The chapter is currently considering how to make micro-volunteering more widely understood and available to the chapter.

2018 – 2019 Board of Directors Recruitment



A key activity for the incoming President is to fill the Board roles for the next season. The goal is to have a full slate of Vice Presidents and ensure a diverse group of board members who understand the importance of good governance and chapter management.

Starting in March, the incoming President meets with all of the current board members to identify their interest for the next season and identify volunteer Directors who may be interested joining the board. To fill vacant positions, we:

- Approached professionals who were active Directors or involved as brand ambassadors in our community. We also asked past chapter leaders for suggestions to engage them in the process and keep them connected to the chapter operations.
- Post the opportunities online with directions to submit applications to the incoming President.
- Meet with all candidates to assess fit. Board role descriptions help support these discussions and provide clarity of responsibilities in the role and as a board member overall.

Following the submission of applications, prospective Board members were selected through a formal election process. This included a nomination committee reviewing all of the submissions to recommend a slate of individuals to be voted in at the Annual General Meeting.

The chapter bylaws state that members must vote to approve Board members on a slate put forward by a nomination committee following an open call for members to be nominated for election. Candidates applied to the call for nominations and were vetted by the selection committee. The selection committee was composed of two active members, the immediate Past-President, the Executive Vice Present, and the President.

The nomination committee put forward the slate to be elected at the AGM by the IABC Ottawa membership. Ten Board members were elected at the AGM (there is automatic succession for President to Past-President and Executive Vice-President to President) for a total of 14 Board members. The Board is elected in June, attends a summer strategy session, and then begins meeting monthly in September.

While Board members are expected to commit to fulfilling at least a one-year term on the Board there are personal or professional situations that arise creating vacancies through the season. If a vacancy occurs, the Board first assesses if the position is crucial to be filled, identifies the skills needed, and determines if an active director can fill the position. The President then can put forward the appointed candidate and the Board votes to approve them. All other volunteer director positions are appointed. We have approximately 12 director positions based on the projects and time of year.

Volunteer Opportunities

There is strong interest in being part of the IABC Ottawa chapter and we often have more volunteers than projects available based on the experience and skills of volunteers. The VP of Leadership Development maintains a spreadsheet of all active volunteers in the chapter, as well as activities that require volunteer support. An organizational chart for Board members and volunteers was created in 2018 to help volunteers understand their “place” and their contributions to the organization (see work sample organization chart).

Onboarding and Development

Training and Board development is a key part of the strategy for the season and the VP, Leadership Development has been working hard to enhance our current training activities to add more development opportunities for Board members.



Onboarding & Training for Board Members and Volunteers

The first part of the training program is orientation. Orientation is provided to all new and returning Board members. They learn about the chapter, its role in IABC internationally, role descriptions, and governance aspects, including the chapter policies and bylaws. Additionally, each Board member does their own orientation with director volunteers and develops tools to help them succeed. For example, the Professional Development portfolio created a complete guide on all the processes they use to run their demanding and well-established portfolio which they passed on to the new VP's going into the 2017/18 season. In October 2017, the VP, Finance developed an internal controls checklist to empower Board members to make smart financial decisions relating to the chapter.

Continued training happens throughout the season at Board meetings. At each meeting, we take time to ensure that all Board members understand what is happening at the local, international, and regional levels of IABC, answer questions and share resources. This helps ensure that Board members can be ambassadors among the membership. Our activities are also connected between portfolios and we use tools from other chapters available on Leader Centre. We also use our Board meetings as an opportunity to hear from other chapters. In 2017/18 season IABC London called in to present on their certification initiative as well as Ginger Homan from IABC International, who called in to do a special presentation on Finance as part of our efforts to grow our understanding and comfort with finances. We also do a regular post-meeting survey to get feedback from Board members and to remain strategic in our thinking and operations.

While Board members onboard, volunteers also undergo formal onboarding with the VP of Leadership Development. This involves a coffee chat to introduce the volunteer to IABC generally, as well as connecting the new volunteer to their new VPs via email introduction. This year the VP of Leadership Development began modifying the Board manual for use for future volunteers. It is expected to be complete in 2019 to be used in the following season.

All volunteers are now spotlighted on the IABC Ottawa website with their bio, photo and their position adding extra spotlight to the people that make our chapter run.

Leadership Development

The VP of Leadership Development is responsible for identifying Board development opportunities. For both the 2017/18 and 2018/19 seasons, all Board members could attend our chapter professional development events at no cost, a significant value add for Board members that encourages their participation in professional development. The VP is currently getting feedback from Board members on what tailored training session they would like to have in the spring of 2019.

To support the further development of Board members, four members went to Leadership Institute (LI) in 2018. We held a post-LI learning session to share knowledge with Board members who did not attend. In preparation for LI 2019, we sent a survey to all Board members in order to assess their interest in attending LI and budgeted accordingly.

The Past-President, President, and Incoming President work closely together to help foster the overall strengths of the chapter, address issues, and support each other in leadership roles. They meet on a monthly basis in addition to regular Board meetings to identify trends and potential issues that may impact the chapter. This strong relationship helps with transition and building strategies that succeed from one season to the next. Additionally, past presidents and leaders are regularly consulted and engaged in special activities

Connecting Leaders beyond the Chapter

Being part of an international community is important to the IABC Ottawa chapter in the connections that it provides members, the global standard it represents for our profession, and the support it provides the chapter. We actively encourage our members to volunteer at the regional and international level by sharing the call for nominations on our communication



channels and reach out directly to members who demonstrate potential and interest. This season, IABC Ottawa's current President and two of our Past-Presidents took on a Board role with the Canada Eastern Region. Three past local board members joined International committees or task forces. As well, IABC Ottawa members are involved in judging IABC awards at a national and international level.

Engagement

Celebrating volunteer contributions is something that is very important to the IABC Ottawa chapter on an on-going basis. We believe that leaders who feel appreciated and supported are key; working to inspire them is therefore an area we continue to enhance. Our activities to recognize volunteers include offering special pricing for events, recognizing a volunteer of the month, and having special annual volunteer awards.

For many years now we have selected a volunteer of the month. Each month the Board votes on the volunteer who has made a significant contribution to the work of the chapter. They are recognized in the newsletter, on our social platforms and at the monthly event. They are also personally given a Starbucks gift card and a thank you card from the Board.

New in the 2018/19 season, the VP Leadership Development also actively solicits feedback from volunteers through a survey. This serves to ensure that volunteers are getting the most out of their experience and that they have a method by which to give feedback should they not understand their role, or wish to contribute in a different way.

Each year, we recognize a volunteer of the year to receive an award for extemporaneous contributions to the chapter over the season. The award is presented at the Annual General Meeting and Season Closer event in June. Further, we have a special Distinguished Service award that is awarded to a member who is involved in IABC locally and internationally and has excelled in their communications career. Both of these awards are voted on by the Board of Directors.

We have developed an IABC policy that all volunteers working at an event receive a complimentary ticket and a policy for all Board members to receive a 10% discount to events. For the 2017/18 season, this policy was adapted and funds were allocated to allow Board members to attend events free of charge. This is part of our work to align the budget with our strategic plan and the focus area of growing our leaders. Furthermore, it helps make the obligation of attending events easier by alleviating personal financial barriers and allowing volunteers and directors to represent the chapter and to have access to professional development to recognize their contributions. The 10% discount can be shared with other volunteers who stand out, at the discretion of Board members.

As well, in the 2018/19 season we introduced a Volunteer and Board Meet and Greet event. This was in response to volunteers feedback in the previous season saying they'd like to meet and have more exposure to Board members. Finally, we incorporate a volunteer celebration event with our Season Closer event and provide complimentary tickets to all volunteers to celebrate the close of a successful season and everyone who is part of the chapter. It is our hope that these type of engagement activities will help to fill the pipeline for future chapter leaders and keep volunteers and members connected to the chapter.

In the past two seasons we've used a communication and collaboration tool called Slack. This helped us create open communication, reduce email clutter, and ensure that all Board members are kept aware of local, national, and international activities. The tool has been very well accepted by the Board and is used on a daily basis according to the analytics showing the number of public and private messages being sent. In the 2017/18 season we opened up the channel to all volunteers which we've had positive feedback on as it helps give them that desired connection to Board members.



All of these collectively, along with regular check-ins, ensure leaders have the support, information, and tools they need help recognize the value of our volunteers.

6. MEASUREMENT & RESULTS

Objectives	Results
<p>Recruit and retain Board members</p>	<ul style="list-style-type: none"> Put forward a full slate for 2017-18 season filling 7 vacant positions with 5 being promotions from either other board roles or directors. In 2018/19 season 50% of the Board stayed for an additional term, and 50% of the Board was staffed by new members. For transparency and good governance followed bylaws for election process. Diverse board composed of: senior communicators, mid-career and young professionals, one student (maintained for the 2017-2018 season). To retain Board members, we have developed a culture that encourages fun. Activities include an IABC-themed bingo, casual dinners, holiday party for board and orientation ice-breakers.
<p>Align new and returning Board members and volunteers with the chapter's strategy</p>	<ul style="list-style-type: none"> Strategic session rated a success by board members highlighted good learning opportunity. Board vision presented to all members at both 2017-2018 and 2018/19 season opener.
<p>Position Board members to thrive in their roles by offering at least two professional development opportunities and financial support to attend Leadership Institute</p>	<ul style="list-style-type: none"> With help of creative budgeting by our Past President and VP Finance, four board members went to Leadership Institute in 2018. Board members participated in a certification session as well as a Finance-learning session, thanks to collaborations from other chapters.
<p>To celebrate and recognize volunteers by having ten outstanding volunteers of the month and an annual volunteer of the year.</p>	<ul style="list-style-type: none"> 11 volunteers recognized during submission period. Volunteer of the Year and Member Distinguished Service recognized at the 2017 and 2018 AGM. 5 volunteers registered for a complimentary ticket to the season closer event in June 2018.