



Central Oklahoma

2020 CMA Award Entry IABC Central Oklahoma: Strategic Planning

Background

The IABC Central Oklahoma Chapter is a small chapter (17 members) with a board consisting of six members, up from 15 members and a board of only four just a couple of years ago. Our chapter is on solid financial footing, but we have struggled to grow our membership in a relatively small market with many other communications and marketing organizations competing for potential members.

With awareness of these challenges, we have worked diligently in recent years to align our strategic planning to the IABC 1720 framework and create realistic and achievable goals for our organization. It's a continually evolving process for our chapter as we balance the needs of our members and the needs of our volunteers with the strategic framework set forth by IABC International.

Goals & Objectives

Our chapter holds an all-day board retreat on a Saturday every summer. This annual retreat provides dedicated planning time and an opportunity for board members to learn their roles and connect with each other as a team. The board reviews previous goals and objectives, modifies plans to reflect organizational changes and establishes the event calendar and budget for the following year.

The objectives detailed below are twofold: the objectives we set related to the strategic planning process overall and those set forth in our strategic plan to help advance the profession, create connection, and develop strategic communicators. In this section, we address key goals and objectives from both aspects of our strategic planning.

1. Identify more realistic goals and objectives in the strategic planning process.

Our board members are energetic individuals with great ideas and big dreams, but this has often led to establishing objectives that simply weren't realistic for a small, all-volunteer board with many other commitments both professionally and personally. Continually missing the objectives we set forth became demoralizing for high achievers on the board, so we set out to create more realistic goals and tabled multiple objectives and tactics in our most recent plan.

2. Align our strategic plan with the IABC 1720 framework to ensure we fully support the vision, purpose, and philosophy of IABC International.

When the IABC 1720 framework was first released, our chapter had four board members and a few committee members struggling to simply keep the chapter alive. Several board meetings had included serious conversations about whether we should officially dissolve the chapter, and we didn't initially take any action to align with the 1720 framework because we were in survival mode. However, starting in 2018 with the addition of new board members, we started to align our objectives accordingly.

3. Streamline and document processes to ensure synergy among all board members, increase ability to cross-train and support each other's efforts, and create smoother transitions for future board members.

Overall efficiency of the board has been a key theme for our chapter in recent years, and we've undertaken specific actions this year to streamline efforts and ensure all processes are documented. This helps ensure efficiency in board member tasks and the ability to more easily onboard new board members, which frees up

both time and mental energy to focus on strategic alignment rather than simply operating in task-oriented mode at all times.

4. Host a GCCC exam with at least two members of local chapter achieving certification in 2019. (Advance the Profession)

The CMP and SCMP certifications are an important aspect of advancing the profession, as they show the skill and ongoing education and development of strategic communicators. As a chapter located in the middle of the country, there were very few opportunities for our members (or non-members) to sit for a certification exam without incurring significant expense for airfare and hotel to attend an exam. We set a goal to host a certification exam in Oklahoma City in 2019 and collaborated with the Tulsa chapter of IABC to cross-promote both exam dates in our state.

5. Host two members-only workshops per programmatic year to add member value and create more in-depth opportunities for members to learn in specific areas. (Create Connection / Develop Strategic Communicators)

We first began hosting members-only workshops in 2016, and during the 2017-2018 programmatic year, each of those workshops resulted in a new member joining our chapter. Workshops are free and are restricted to members only — non-members cannot attend even if they offer to pay a non-member fee. This is one of the most significant ways we add local value for our members and help create connection and develop strategic communicators. In 2018-2019 programmatic year (July-June), our goal was to host two workshops with a future goal to increase the number up to four in 2019-2020.

6. Launch mentorship program and make three mentorship pairings in 2019. (Develop Strategic Communicators / Create Connection)

Mentorship has always been a key element of our chapter, though it was happening informally among board members and members in the past. For many of our engaged members, their IABC story includes the value of mentorship opportunities within IABC. This year, we set a goal to formalize a mentorship program and make three mentor/mentee pairings.

Budget

The budget involved in strategic planning efforts for our chapter is minimal overall. We allocate approximately \$200 for our annual retreat, which covers both the cost of supplies and lunch for board members the day of the retreat. Budget considerations for objectives outlined in our strategic plan are incorporated into individual portfolio budgets. For example, we budget \$150 per members-only workshop within the membership portfolio's budget to cover the cost of food. There was no budget required for the first year of our mentorship program, and we budgeted \$50 for refreshments for hosting the GCCC exam and secured a free venue for the exam.

Implementation

Implementation of our strategic plan process goals and objectives (numbers 1 and 2 above) centered around board discussion of realistic targets and what we felt was feasible for our small but dedicated board to achieve. We began with a basic review of our previous strategic plan and noted which objectives had been achieved, which were ongoing, and which needed to be revised to be realistic or simply tabled for a future date. From there, the board made modifications to the plan and ensured alignment for advancing the profession, creating connection, and developing strategic communicators. (*Attachment A - Prior Strategic Plan with Notes, Attachment B - Current Strategic Plan*)

Objective 3 for streamlining and documenting processes has been a key focus of our chapter. We know that by creating a foundational level of support, we will be able to focus more clearly on strategic objectives. While we had job descriptions for each board role, each volunteer would often end up managing their

portfolio in relative isolation. In the event of illness, other critical work priorities, or a board member leaving the board without notice, other board members would cover that work but often not efficiently because of lack of documentation. Thus, each board member was tasked with making a detailed list of the tasks and the processes that went beyond their basic job description. This creates opportunity for cross-training of committee members or board members, and it also creates opportunity to regularly review processes and identify areas to streamline.

These checklists now reside on our shared Google Drive for access by any board member, and we're exploring the possibility of moving them to a project management system for even greater efficiency. (*Attachment C – Responsibility Checklists*)

For implementation of our targeted alignment efforts, the board and committee volunteers worked together to create a plan for each specific program or event.

Promoting GCCC certification is one of the key ways we can help advance the profession, and our board wanted to ensure an opportunity existed for people to take the exam close to home. Our chapter collaborated with the Tulsa chapter (approximately two hours away) to coordinate exam dates to ensure that anyone who took one exam and did not pass would have an opportunity to retake on the other date within Oklahoma. We also cross-promoted both exam dates among our chapters and reached out to chapters in surrounding states to promote the exam.

For our chapter specifically, we promoted GCCC certification in emails and on our website for a year prior and passed out interest forms at all events to capture contact information for anyone who was interested in learning more about certification. We had a total of five test takers the day of the exam. Between that exam date in April and the earlier exam date at Leadership Institute in February, the Central Oklahoma chapter now has two members who have obtained certification: one CMP and one SCMP.

To create connection and develop professional communicators, we committed to hosting a minimum of two members-only workshops per year. These events are two hours in length and typically a small group, which allows for a deeper dive into the topics compared to our monthly professional development lunch, which is only an hour long. Our board felt strongly that these events should be a value add for members, and thus attendance is restricted to active members. Execution is relatively straightforward in lining up a workshop facilitator, promoting the event, and providing some light refreshments.

A key initiative for our chapter in developing professional communicators in the past year was the launch of our mentorship program. In 2018, we began planning to formally structure a mentorship program as a value add to existing members, a recruitment tool for new members and a key opportunity to align with IABC strategy to develop strategic communicators and create connection. We formed a mentorship committee, and a new volunteer helped drive efforts to bring this program to fruition. We researched what other chapters were doing in terms of mentorship program structure and identified lessons learned through the mentorship toolkit provided in Leader Centre. For our first year, we structured the program to last six months and include an initial goals worksheet for mentees and mentors and a concluding survey for both mentees and mentors. We worked closely with an area university to recruit some students into our mentorship program and welcomed them as student members of the chapter.

Measurement and Results

1. Identify more realistic goals and objectives in the strategic planning process.

Status: **MET, ongoing**

In our most recent strategic plan, we reduced the targets for three objectives and identified two additional objectives as back burner rather than key priorities. We likewise identified several tactics as not critical right now to allow our board and volunteers to focus more heavily on our key objectives.

2. Align strategic plan with the IABC 1720 framework.

Status: **MET**

Each objective in our strategic plan is now tied to one of the three pillars for IABC, and the board has discussed additional future revisions to our strategic plan to ensure even stronger alignment.

3. Streamline and document processes.

Status: **Partially met, ongoing**

Currently, our financial processes have been most effectively streamlined and documented, but we also have documented processes for pre- and post-event actions for professional development luncheons and a documented process for following up with guests after events. This is an ongoing effort of our chapter to streamline and document for efficiency and effectiveness.

4. Host a GCCC exam with at least two members of chapter achieving certification in 2019.

Status: **MET**

The first member of our chapter to be certified was Linda Wesley, CMP, who sat for the exam at Leadership Institute in February 2019. This allowed her to obtain her certification and then serve as one of the proctors for our local exam date. We hosted a GCCC exam on Saturday, April 13, 2019 with five test takers: one from the Central Oklahoma chapter and four from the Tulsa chapter. Denise Vladovich, SCMP, became the second member of our local chapter to obtain certification.

5. Host two members-only workshops per programmatic year.

Status: **MET**

In the 2018-2019 year, we hosted a members-only workshop in October 2018 on the topic of SEO Domination and in April 2019 on the topic of Connecting with Others (DiSC workshop). For the current programmatic year thus far, we've hosted one members-only workshop in early November 2019 on the topic of Creating a Strategic Communications Plan. To date, average attendance at these events has been five members, and we are discussing strategies to leverage more personal invitations and increase overall member engagement with these events. Those who've attended have provided overwhelmingly positive feedback on the value of these learning opportunities.

6. Launch mentorship program and make three mentorship pairings in 2019.

Status: **Partially met**

We opened applications for both mentors and mentees in March of 2019 and received four applications from potential mentees and two applications from potential mentors. One mentee applicant withdrew early in the process due to medical issues, and our mentorship program moved forward with three mentorship pairings. Through the course of the six-month program, one student mentee took on additional leadership responsibilities within a student organization and did not fully complete the program. The remaining two mentee participants fully engaged and completed in-person monthly meetings with their mentor. In the post-program evaluation, both indicated that they strongly agreed that the mentoring relationship was beneficial to their career and either agreed or strongly agreed that they would recommend the program to someone else.