

Application: Volunteer Engagement & Leadership Development			
Chapter	IABC Ottawa Division 1 - Large	Chapter Board Term	July 1 to June 30
Region	Canada East	Timeline	1 July 2019 - 31 December 2020
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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 all within 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, our 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 & chapter engagement. 2. Balancing member-only events that provide member value, while extending our reach to untapped audiences 3. The impact of the COVID-19 pandemic on overall program delivery.**

### 2. OVERVIEW

IABC Ottawa connects members with a range of opportunities including the chance to grow in their careers and develop themselves through board and volunteer leadership roles. Our board members and volunteers are vital to the chapter's success because they act as brand ambassadors in our community and are responsible for making our vibrant chapter run. With this in mind, we train our volunteers using the chapter's vision and strive to make each role a fun, rewarding experience. The diverse and supportive IABC culture is evident throughout the community in Ottawa and most notably within the board and volunteer sphere. We strive to have a diverse board composed of senior communicators, mid-career and young professionals as well as students working together.

Two of IABC's strategic pillars, "advance profession" and "develop strategic communicators" are deeply rooted in our leadership strategy. We focus on developing strategic communicators at the board and volunteer level and offer free opportunities for them to foster their leadership skills.

### 3. GOALS & OBJECTIVES

The goal for our chapter's leadership development is to advance our profession by developing strategic communicators. The following objectives were set at our strategic planning session to help us achieve our goal:

- Develop strong **collective board values** for the 2020/21 season.

- Develop **individual leadership competencies** of board members to help them better serve their volunteers, and advance their professional development.
- **Recruit** and **Retain** board members and volunteers for the 2019/2020, 2020/2021 season, with a focus on building the pipeline of volunteers (Volunteers → Directors → Board of Directors).
- **Celebrate** and **recognize** volunteers by announcing a volunteer of the month on social media and in the newsletter and one outstanding volunteer of the season; and
- **Provide ongoing** professional development opportunities for all board members and volunteers at IABC Ottawa events.

#### 4. BUDGET

The chapter focuses on leadership development in its budgeting process because we want to develop and sustain strong leaders. As part of our strategic budget planning, in 2018/19 we invested over \$2021 in leadership activities. In 2019/2020, this increased for \$3890 to accommodate 3 volunteer events, and more budget allocated to Leadership Institute funding. In the 2020/2021 season, these values were decreased monetarily, but increased in quantity and opportunities through more cost effective and virtual programming. These activities include: Board and volunteer appreciation meals, Leadership Institute, board members' tickets to events, volunteer discounts to events, gift card recognizing excellent work completed by volunteers and two "Meet & Greet" board/volunteer events. There is no direct revenue from leadership development at this time.

#### 5. IMPLEMENTATION ACTIVITIES

**Strategic Planning.** The President focuses the **orientation session** for the board on learning about IABC locally, regionally, and internationally and fun team building activities. A Volunteer Orientation Guide (**Work Sample 4**) was developed out of an identified need in 2019, and other presentation and supporting documents are made available to the board on the chapter Google Drive and Slack channel and shared with returning and new volunteers. The Orientation Guide was updated again in 2020 for the new season, and under the new landscape created by COVID-19.

The **strategic planning session**, led by the President of the board, enables the chapter to dive deep into the strategy. The planning portion starts with refining focus areas/objectives to guide the chapter to ensure we are aligned 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. Following the strategy session most portfolios held planning sessions with volunteers to confirm tactical plans for the season. The Treasurer then met with each portfolio Vice-President(s) and volunteers to discuss budget needs to inform thoughtful budget planning. As an accountability measure, the board attends monthly meetings where they report on the progress and achievements of their portfolios and discuss outstanding action items. Board reports are shared with everyone 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. In between board meetings, the board is also active on Slack and meets for coffee chats (in person, and now virtually) to discuss any overlapping tactics and goals.

**Volunteer Recruitment.** As a volunteer-run association, IABC Ottawa's success is wholly dependent on the recruitment and retention of highly engaged individuals. Volunteer needs are identified early in the season and the board is responsible for working with the VP of Leadership Development to develop job descriptions for all roles. IABC Ottawa primarily recruits volunteers **on social media, our website, and through word-of-mouth**. We receive volunteer interest on a weekly basis and find more senior or long-serving 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, which are available on our website. The board has identified professional development and networking events as a key opportunity to gauge the interest of attendees in volunteering with the chapter. Qualified applicants that meet the needs of an available volunteer 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 new volunteer orientation guide compliments this. The VP leading the volunteers' interested portfolio assesses the candidate for fit, skills, and the unique needs of the role. This approach helps our board gain experience with a hiring process.

**Board of Directors Recruitment.** A key activity for the incoming President is to fill vacant board positions for the season. The goal is to have a full slate of VPs 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 in joining the board.

To fill vacant positions, we:

- **Approach** professionals who are active Directors or involved as brand ambassadors in our community.
- **Post** the opportunities on our website, social media, and newsletter with instructions on how to apply.
- **Meet** with all candidates to assess fit. Board role descriptions help provide a clarity of the responsibilities as a board member, VP of a portfolio, and support discussions between the incoming President and applicant.

**Volunteer Opportunities.** There is strong interest in being part of the IABC Ottawa chapter and we often have more volunteers than available projects, which are 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 both the 2019/2020 and 2020/2021 season and shared with the board and volunteers to help volunteers understand their "place" and their contributions to the organization.

**Onboarding - Board Members & Volunteers.** Training and board development is a key part of the strategy for the season and the VP, Leadership Development enhanced the chapter's training activities by adding more development opportunities for board members. This included 1 on 1 leadership development coaching for board members starting in 2020.

**Leadership Development.** For both the 2019/2020, and 2020/21 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, and recognizes their service to the IABC Ottawa community. To support the further development of board members, 4 members went to Leadership Institute (LI) in 2020. The board held a post-LI learning session to share knowledge with board members who did not attend. In preparation for LI 2021, we sent a survey to all board members in order to assess their interest. We also encourage Leaders to participate in IABC World Conference, and connect with them on a regular basis to track participation, and interest.

The newest addition to board leadership development, has been **coaching**. As part of the 2020-2021 season, one-on-one personal and professional coaching was introduced for each board member. The coaching was introduced to help board members maximize their personal and professional potential. Lauren Doty, VP of Leadership Development for the Ottawa chapter, served as the coach for each board member, who has a Personal and Professional Coach Certification (PPCC) from Concordia University in Montreal, and is also pursuing her Associate Coach Certification (ACC) from the International Coaching Federation (ICF). Each coaching session for each board member took place monthly for one hour, with coaching contracts generally lasting from October 2020 to June 2021. Due to the confidential nature of these coaching sessions, the specific content of these sessions cannot be discussed, but generally, board members bring a topic for discussion where the issues or problems, whether personal or professional, would be unpacked with Lauren, followed by a discussion on goal setting and action planning to address it. 12 coaching sessions were completed in 2020, with 54 expected to be completed in 2021, for a total of 66 hours of coaching across the 2020-21 season. (See **Work Sample 1 and 2**)

The President, Incoming President and Past-President also work closely to foster the overall strengths of the chapter, address issues, and supporting each other to grow within their 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.

**Engagement.** Celebrating volunteer contributions frequently is important to the chapter. We believe that leaders who feel appreciated and supported are key so working to inspire them is an area we continue to enhance with: regular check-ins, ensure leaders have the support, information, and tools. The Chapter also hosts a minimum of two volunteer recognition events (in person, and now virtually), to connect the team, celebrate the collective successes of the chapter, and allow volunteers to network across all portfolios. Our activities to recognize and engage our network of Leaders includes (See **Work Sample 2 and 3 for examples**):

- Event Discounts (board and volunteer)
- Two Meet & Greet Events (board and volunteer)
- A Volunteer Pulse Check Survey
- Volunteer of the Month Awards (Monthly)
- Volunteer of the Year Award (Seasonally)
- Slack Channels, and digital engagement

## 6. MEASUREMENT & RESULTS

<p>Develop strong <b>collective Board values</b> for the 2020/21 season.</p>	<p><b>Achieved:</b> Board developed board values through a digital assessment (individually), and a team strategy session in October 2020 and has been leveraged during each following board meeting.</p>
<p>Develop <b>individual leadership competencies</b> of board members to help them better serve their volunteers, and advance their professional development.</p>	<p><b>Achieved &amp; In Progress:</b> <b>12</b> coaching sessions were completed in 2020, with 54 expected to be completed in 2021, for a total of 66 hours of coaching across the 2020-21 season.</p>
<p><b>Recruit and Retain</b> Board members and volunteers for the 2019/2020, 2020/2021 season, with a focus on building the pipeline of volunteers (Volunteers → Directors → Board of Directors)</p>	<p><b>Achieved: 2019/2020:</b> <b>13</b> Board positions were filled (100% of the available roles). One left the board because they moved to another city. Diverse board composed of: senior communicators, mid-career, young professionals and students remained for both seasons. <b>Five</b> board members from 2018/19 season (38%) were retained to the 2019/20 Board of Directors. <b>Three</b> volunteers were retained from directors in 2018/2019 to board members in 2019/2020.</p> <p><b>Achieved: 2020/2021:</b> <b>10</b> Board positions were filled in 2020/2021 (100% of the available roles). Diverse board composed of: senior communicators, mid-career, and young professionals. Goal of bringing on a senior communicator for VP role was achieved. <b>Six</b> board members from 2019/20 season (60%) were retained. <b>Two</b> directors from 2019/20 transitioned into board roles. <b>10</b> volunteers were retained from directors in 2018/2019 to board members in 2019/2020.</p>
<p><b>Celebrate and recognize</b> volunteers by announcing volunteer of the month on social media and in the newsletter and one outstanding volunteer of the season</p>	<p><b>Achieved: 2019/2020:</b> <b>10</b> Volunteers of the Month were recognized, and <b>one</b> Volunteer of the Year was announced and celebrated at the AGM digitally.</p> <p><b>In Progress: 2020/21:</b> <b>Five</b> Volunteers of the Month have been recognized to date, each being profiled on social media and receiving a small gift card.</p>
<p><b>Provide ongoing</b> professional development opportunities for all board members and volunteers at IABC Ottawa events.</p>	<ul style="list-style-type: none"> <li>• <b>Four</b> board members went to Leadership Institute in 2020, and two in 2021.</li> <li>• Board members participated in a finance-learning session in 2020.</li> <li>• Board members and volunteers were given <b>free tickets</b> to all events.</li> </ul>