



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)
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1. BACKGROUND & 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

2. OVERVIEW

Strategic planning and having an overall chapter plan to guide the Board each season has always been a key practice for IABC Ottawa as part of our effort to ensure we practice good governance. While the processes for developing the plan evolves each season, it traditionally has been developed over the summer by the incoming Board during a strategy session led by the President. Over the past two years we have built not only strong succession in chapter leadership but also developed more collaboration between the President, Executive Vice President and Past President in chapter



planning, operations and general guidance throughout the season, specifically through a monthly breakfast meeting and regular check-ins. This helps to strengthen chapter leadership and develop a strategy that builds year over year with key learning, insight and considerations making a more sustainable chapter. We also have observed more continuation in strategy and the seeds of activities starting in one season and taking place in a future season as part of this collaboration.

For the 2017-2018 season we built on elements of the previous season and looked to find alignment with IABC's 1720 strategy which really resonated with the chapter. The planning for the 2017-2018 season started two months before the session with a short listening tour that included informal and formal focus groups that were used along with international insights, the 1720 plan, and past experience to inform the chapter plan. The plan aimed to put members at the core and look at how the IABC value proposition and focus on advancing the profession, connecting communicators, and developing strategic communicators could be put into practice locally.

As we approached the 2018-2019 season the Board reflected on the challenges, successes, opportunities and insights to continue to ensure we localized the international strategy and had a strategy that would be good for the chapter. Using the framework with to focus our chapter we developed a clear direction over the past two years while ensuring we took an agile approach to adapt to the challenges we faced during the season. Being agile was key as we learned how to recognize the small and big wins for the chapter.

1. GOALS AND OBJECTIVES

IABC Ottawa considers the needs of our members, chapter 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.

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

- To develop a strategic plan that incorporates informal member input and international insights.
- 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 12 board members to actively contribute to developing the strategy and take ownership for carrying it out throughout the season.
- To have quarterly meetings, key questions during each board meeting, and check-in measures to ensure the strategy is taking shape.

4. BUDGET

We did not designate a budget to strategic planning and the only costs that came from the board orientation and strategy sessions was food. This cost was taken from our board meeting budget, which allows us to spend up to \$100 per meeting. All future measurement that came from the orientation and strategy planning sessions connected with portfolio budgets. There was no direct revenue from the strategic planning process.

While there was no specific budget dedicated to strategic planning, 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

To develop our strategy for the 2017-2018 and the 2018-2019 seasons, the incoming President went on small, informal listening tours, talking to members, volunteers, past leaders, and incoming leaders to better understand our community’s challenges and needs with the hopes of building a strategy that reflected their input. Our chapter understood and agreed with the focus of the 1720 strategy and were excited to tackle the task of incorporating this approach to the work we were doing here in Ottawa. The 1720 strategy articulated all of the conversations we had been having one-on-one and helped us establish a clear path forward.

Some of the key insights from our listening tours with members highlighted the following opportunities and needs:

2017-2018 Season	2018-2019 Season
<ul style="list-style-type: none"> ● Corporate members were interested in sharing their expertise/award winning work with others ● Smaller, focused events are valuable to members as they offer career advice, help solve business challenges, and empower ideas ● Experienced professionals are looking for Senior Communicator events ● Many like and see the value in our Jobline service ● Our members value being part of a community ● People enjoy careers in communications because of the impact they can have in their organization and the fact that the industry is constantly evolving ● Many communicators in Ottawa are part of small teams ● The new IABC vision of “a communicator at the heart of every organization” resonated with members, chapter leaders, and others in the communications community 	<ul style="list-style-type: none"> ● Feedback collected from the Past President dinner identified that past Presidents want to be involved in supporting the chapter’s professional development planning, such as being a speaker at an even or recommending a theme for the next event ● Past Presidents also shared that they are actively talking about the positive impact IABC Ottawa has on the communications community ● Volunteers enjoy the work they do but would like to connect in person with other chapter members ● Work demands can make it hard for volunteers/members to execute their ideas for the chapter ● Special Interest Groups (SIGs) and Senior Communicator events are extremely valuable as they offer practical takeaways ● Members are looking for events focused on timely topics rather than thought leadership keynotes

Talking to members and active volunteers gave us further insight into our community and also supported many of the observations we made during the international tour, which identified what all IABC members value and what their challenges are. We noticed that these one-on-one or small group sessions had a higher participation rate than many of our local member surveys. From the insights and conversations in 2017 we decided to change the local mission to demonstrate value to members through professional development and networking opportunities, delivering communications excellence through content, and being the go-to resources on everything communications in Ottawa. We also adopted the international vision and used the IABC1720 strategy as a framework for our own local strategy. This framework continues to be the foundation we build our strategic planning on.

Board Orientation and Strategy Planning



From the 2018-2019 season, many Board members shared that their two main motivations for joining the board were (i.) learn board governance and (ii.) to better understand how IABC international works. In the past, the board tried to hold one meeting in the summer used as both an orientation and strategy planning session but there was too much information to cover effectively. That is why we decided to host two sessions — one orientation session held in July 2017 and one strategy session held in August 2018 — to help board members learn their roles, understand how IABC operations work on a local, regional, and international platform, and how to align our strategy with the IABC framework.

We used a variety of communication tools and tactics to familiarize the incoming Board members with the IABC organization and the local chapter. This included:

- Creating an introductory presentation that spotlighted the international community. We did this by collecting advice from IABC leaders around the world, sharing the IABC1720 strategy videos, and highlighting each Board members area of responsibility and their main activities and how some Board members' portfolios overlapped. We also played interactive games to give Board members a chance to informally learn about one another.
- In advance of the orientation, the Membership portfolio analyzed the makeup of our membership and created detailed member personas to help us further understand our members. Both new and returning board members said this session was incredibly valuable for learning their roles and getting to know others on the board through team building activities. It laid a solid foundation of knowledge to lead our chapter planning session in August.

Budget Planning

Following the strategy session, we created a strategic budget in the Fall of 2018 to ensure the sustainability of the chapter and set our season up for success. Part of the preparation for creating the budget included one-on-one 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 before voting on implementing it. This process helped ensure that we had budgeted for new initiatives such as SIGs for members, member gifts, and leadership development support. For both the 2017-2018 and 2018-2019 season a strategic budgeting process was followed to ensure that all board members understood and were comfortable with the budget.

Alignment with IABC International

We knew that keeping our Board members engaged more broadly in IABC and thinking about IABC regionally and internationally would be a key challenge going forward. As such, our alignment with IABC International activities included encouraging and supporting IABC Ottawa members to join the IABC Canada East Region (CER) board. Ottawa member Kelly Rusk became Vice Chair of CER and was invited to attend the chapter board meeting to share information about the region and the regional growth plan so we, locally, would understand the region's connection to us. This strengthened the Board's understanding of how different IABC chapters around the world are focusing on the three pillars. To further connect ourselves with IABC, our Board set up meetings with regional and international representatives. First, we invited a member of IABC London to present their experience with hosting certification exams for their chapter to our board, which was beneficial as it helped us begin preparing for our certification exam. Then we invited Ginger Homan, then Vice Chair of IABC International Executive Board, and Alain Legault, Treasurer on the International Executive Board (IEB), to present to the IABC Ottawa Board about fiscal responsibility and long-term planning, which helped framed our financial conversations moving forward.



In our orientation and strategy planning sessions, the Board acknowledged that we could not do everything we wanted to immediately and many of our big ideas to advance the vision and three pillars would happen throughout the season and carry over into future seasons. Our goal was to create a strategic plan for the season that would also allow us to create an overarching multi-season strategic plan to help support season-to-season continuity of the chapter. Professional Development is one of our chapter's core activities and a key alignment area. For the season the Professional Development theme was powering communicators, focusing on topics tailored to strategic communicators.

Chapter Growth

In the first year of the 2017-2018 season of modeling our local strategy off of the 1720 framework, the Board collectively identified high level goals for the chapter to improve upon. Throughout the year we consistently talked about the pillars and how the Board was implementing the pillars throughout our activities and asked ourselves: did the activities advance the chapter's goals? Were the pillars resonating and fitting in with our chapter? We noticed that these check-ins helped us focus on implementing the pillars in our chapter and create local leaders who understood the value of IABC, were able to communicate the value of IABC to others and think how their activities contributed to the chapter.

To further the strategy and chapter activities in the 2018-2019 season we reflected on the key challenge that some portfolios from the 2017-2018 season had in clearly defining their own objectives in the chapter's strategy. To address this challenge in 2018 at our strategy planning session we held up the pillars of IABC and compared them against each chapter portfolio and asked ourselves what we still needed to do to make sure our portfolios reflected the pillars.

Also, for the 2018 strategy session we were hyper-focused on planning ways we could create connections among our members, as volunteers and members highlighted this as something they were looking for. We continue to evolve the strategy and built on it as we determine the best way to run the chapter and what opportunities for membership growth we need to capture.

New Ideas

We worked to create connections among members through events, SIGs, and leadership development activities. We also sought to advance the communications profession by talking about IABC international initiatives and used timely topics of discussion as the focus of our SIGs and tried to offer a certification exam, which unfortunately was set for the wrong time of year and no one challenged the exam,

For our chapter, aligning our vision and pillars with IABC international seemed like the next natural step in the evolution of our chapter and it has helped strengthen IABC Ottawa and give us focus. We were one of the first chapters in the world to adopt the new IABC brand in 2015. Furthermore, our popular podcast, the Voice, is available for streaming worldwide and has many international listeners. This framework drives value for members which is a core goal of our chapter and expands our activities beyond traditional professional development activities. The planning and strategy of the three pillars did not stop at the strategy session or with the Board. These pillars and our approach to bringing them to life was entwined into all of our chapter messaging from events descriptions to newsletter articles, and introductions at events. A more in-depth discussion of the strategy was shared at our 2017-2018 and 2018-2019 season openers and closers to give members a look at what connects IABC to the activities of our chapter. For the first time we hosted a Past Presidents dinner bringing together Past Presidents from over 20 years ago. It was a great success and shared these pillars with them so they could see how IABC Ottawa IABC Ottawa operates today. Developing strategic communicators, creating connection, and advancing the profession are pillars you continue to hear and see connected with everything IABC Ottawa does.



Chapter Planning

Our planning started in 2017 when the Past President, President, and Executive Vice President met to plan the board strategy session. For the 2017-2018 season we choose four areas to focus on: retaining members, growing chapter leaders, connecting to IABC beyond Ottawa, and having a sustainable chapter. The proposed objectives were developed based on the observations of the previous seasons and how we could build on their success around leadership development and the IABC pillars around Advancing, Connecting, and Developing. We believed that the process of going through the strategy discussions as a team would be as important as the plan we created.

The strategy session started with looking at the 1720 strategy and the objectives we had for the season. With clear objectives to guide us, the Board split into smaller groups to brainstorm what we would do to within the pillars and decided on four big ideas: advance the profession, create connection, and develop strategic communicators. We also decided our activities would focus on strategic communicators with 5 to 12 years of experience. While new ideas for growth play a role in our planning, acknowledging what we do well, what we want to keep doing, what needs to be done to run the chapter, and the resources we have to do it are key to success. This approach led to a solid plan that had consensus around the table and shared responsibility. To help activate the plan, a two-page roadmap was created. The strategy was used to develop our budget so it aligned with what we wanted to focus on during the season. An impact of the strategic budgeting process was the leadership development budget line to help increase board members attendance at events as well as the membership's budget line focused on initiatives that support all the members in the chapter. For example, creating customized IABC Ottawa member swag and mailing it to them.

In the first couple of months into the 2018-2019 season we followed a similar process with the major difference being more focused planning on what each portfolio needed to do to run and ensure sustainability and ideas for each specific portfolio to advance the overarching chapter goal. The 1720 framework still guided our strategy with three focus areas being defined for the chapter for the year, which are: Create Connections; Develop. Teach. Learn.; and Provide value for members.

These three areas reflect feedback from our listening tour and the high interest from our members in increasing connections among one another through activities like in-person meet ups and using a Slack channel. As well, event attendees said countless times in the year that what differentiates IABC events in Ottawa is that you get practical tips and takeaways from the events you can go back and apply to your work.

Being agile and adapting the strategy throughout the 2017-2018 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, 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. 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. It also was one of the driving forces behind us hosting a SIG on wellness in the workplace. Open communication with community leaders was very important as many wanted to find a way to contribute as well as lean on the community for support. We were able to turn this challenge into an important conversation that helped grow our community, which showcased the value of IABC Ottawa.

We also faced the challenge of a hacked chapter website. It was a goal of the 2017-2018 season to develop and launch a new chapter website by the end of the season. Unfortunately, our timeline changed quickly as we had to cut our timeline significantly to respond to having our website hacked twice in a short amount of time. We used the skills within the Board to launch a new website in under five days with



refreshed content, enhanced visuals, and a mobile friendly platform, which was not feasible on the old platform. We incorporated messaging from our strategy into the website and while this was not the process we were expecting and we had to place other projects on hold, the results were positive.

Chapter planning did not end at the session or with the strategic plan. Our Professional Development team developed their theme for the season from the pillars and created the theme of “Powering Communicators”, with each event striving to focus on at least one of the pillar areas. Our September 2017 season opener focused on connecting and advancing the communications profession as it featured a communicator who gave a keynote on their transition into a COO position for an organization. It is through strategies and tactics like these that allows us to execute each portfolio’s strategy. There were also brainstorming sessions on new initiatives such as SIGs to solve the challenge of creating member only events for intimate conversations about situations communications face on a day to day basis.

We have used the IABC overall strategy to help us make decisions on what we have the capacity to do and where to focus our activities. An example of this was the 2017 holiday party we were asked to co-partner on. While the party was a departure from our usual approach we determined that the value of creating connection would help us advance our strategy. Focusing on these areas helped affirm our decisions and ensure our community leaders were supported. The strategy is reviewed often at Board meetings and cited by leaders during smaller team meetings to ensure alignment. When gaps appear, we look at activities to address them. (For example, we created our own mad libs activity to develop easy and relatable elevator pitches to articulate the value each IABC Ottawa Board member has to our chapter and the organization and used them throughout the year.) 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. This has been key as we address challenges of Board members balancing multiple priorities beyond their roles and needing to be nimble and able to take quick action.

Metrics

It was important to the board that there were multiple planning sessions and frequent opportunities to monitor and review the plan. We pride ourselves on being a chapter that can easily adapt to challenges including those that come with being a volunteer run chapter. Learning from our predecessors, we split the board year into thirds September to December, January to March, and March to June —to evenly measure the success of our activities during each time frame. These periods were created around times we had noticed slow-down in previous Board members

To help with measuring what we have done and our ongoing progress, we ensured that the objectives set in our strategy were measurable (see Appendix E) and **over 80% of our big ideas have moved forward for success.**

To evaluate and gauge success we have put the following checks in place:

- Bi-monthly check-ins on the strategy and going through a Trello board that outlines what we did in the different areas as of December 2017 and in the Spring.
- Holding monthly Board meetings that require Board members to submit reports that detail what they worked on that month, how it advanced the communications professions, and how it connects to the chapter’s strategy. For the 2018-2019 season we added a box at the top of each report that highlights the key objectives of each portfolio for the season as it acts as a reminder for what each Board member committed to.

6. MEASUREMENT & RESULTS

The strategic planning process for the 2017-2018 season ran from March 2017 to September 2017. The implementation and measurement has been ongoing since but the process and implementation have



yielded progress on the objective set for strategic planning as outlined below.

Objective	Results
<p>To develop a strategic plan that incorporates member input gathered from a listening tour and international insights.</p>	<ul style="list-style-type: none"> ● Conducted a listening tour featuring informal member and non-member conversations and looked at international data. ● Shared the information collected with the Board during an orientation session and strategy planning session to help lead the plan for the 2017-2018 and 2018-2019 seasons. ● Used the data collected to inform the strategic plan. ● Built a budget that was reflective of our strategy in 2017 and 2018.
<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"> ● Matched the member feedback heard during local listening tours to the IABC International framework. ● Used the IABC framework to build the big ideas that created the IABC Ottawa strategy for the 2017-2018 season and focus the strategy in the 2018-2019 season. ● The 2017-2018 season developed four big ideas with key metrics for success under the advance, connect, and develop pillars. ● The 2018-2019 season is looking at tactical plans to advance the pillars in each portfolio.
<p>For all board members to actively contribute to developing the strategy and take ownership for carrying it out throughout the season.</p>	<ul style="list-style-type: none"> ● Obtained buy-in from all board members about localizing the IABC international framework. ● Created a roadmap to help implement the strategy, which is taken out and revisited at Board meetings and added as priority areas to the top of each Board report. ● Reformatted Board reports to ensure members are able to discuss strategy and specifically how their work connects to the three pillars.
<p>To put in place quarterly check-in measures to ensure the strategy comes to life from the page and use the strategic questions at each board meeting.</p>	<ul style="list-style-type: none"> ● Created a Board Bingo card that highlights activities that connect directly to the strategy and three pillars in September 2017. ● Used reformatted Board reports to engage in regular discussions with Board members about strategic directions and how their activities connect with the overall vision. ● Continue to meet monthly with the Board to discuss strategy and head off any challenges through both seasons. ● Continued to ask questions about activities, choices and items when we encountered challenges of how we were connecting, developing, and advancing.