



Overview

Toronto is one of the largest cities in Canada and has a diverse economy covering large public and private corporations, small businesses and non-profit organizations in the health care, financial services, government, education, consumer products and technology sectors. IABC/Toronto has almost 1,100 members across the Greater Toronto Area (GTA) metropolis and they work in a variety of disciplines: public and media relations, corporate communications, employee communications, public affairs, investor relations, marketing communications, graphic design, website development and social media. Key facts about our members:

- 85% are working professionals and of these 26% are corporate members
- 25% work for some type of corporation and 13% work in agency
- 27% are at the manager level and another third are directors and senior executives

Purpose and goals for 2017-2018:

We started the board year by defining our purpose:

“IABC/Toronto exists to create connection between professionals in the brand, marketing and communication functions and the broader business community to elevate our profession. We convene thought leaders with a unique and relevant point of view to facilitate learning and development opportunities for our community, our volunteers and our board.”

Our overarching goals for the year were to:

- Keep our Purpose at the heart of all we do
- Be transparent and open with our stakeholders
- Maintain our financial health with a view to long-term sustainability

All portfolios were asked to align their plan to the purpose and overarching goals.

Professional Development Strategy

Background

Professional development is at the heart of IABC/Toronto’s purpose. For many years the chapter had a dedicated portfolio for Professional Development. The VP of Professional Development organized monthly in-person events with the support of director volunteers. However, declining attendance over time and anecdotal member feedback told us that people wanted different ways of learning, from online to in-person, based on their interests and/or career goals. As a result, starting in the 2015 the chapter starting offering professional development through different portfolios. This also eased volunteer burnout by dividing the work across several board roles.

Developing the 2017-2018 PD approach

At the start of the board year, we conducted a survey as part of the first President’s Message to understand what members and non-members were looking for and to validate anecdotal feedback.

Our in-person events typically attract more non-members than members (63% non-member attendees in the 2016-17 board year). Therefore, we wanted to collect feedback from the broader communication community to make our programming relevant for all.

In the survey we asked a specific question to gauge interest in a list of IABC/Toronto programs and events. Survey respondents expressed interest in the following:

- 79%: in-person PD sessions and workshops
- 78%: member discounts to non-chapter initiatives and events
- 85%: access to other IABC Programs such as the Academy
- 50%: events for special interest groups (independent communicators)
- 53%: Communicator of the Year Breakfast

The chapter strongly believes that in-person events deliver the most value at a local level and provide the greatest opportunity to “create connection.” Keeping that mind as well as the survey results, our PD strategy was to focus efforts primarily on in-person events and strategic partnerships, while promoting the professional development offered by IABC (World Conference, Academy, webinars) and certification to present a comprehensive picture of professional development under the IABC brand.

Guiding principles

Our PD strategy was guided by the below principles:

Economic sustainability

- Strive for revenue generation and cost-recovery on events (break-even).
- Contribute positively to the chapter's economic sustainability for 2017-2018.

Excellence in Member engagement

- Deliver strong execution in events with a consideration for member experience.
- Drive event planning through member surveys and feedback.

Diversity and inclusion:

- Provide learning opportunities in a range of disciplines.
- Ensure diverse representation on all panels (no all-male/all-white panels).

Target audience

Five to six years ago, the chapter had success with events targeting niche audiences like students, recent graduates and senior communicators. However, declining attendance at these targeted events over time and rising costs in downtown Toronto meant that we couldn't offer such events in a cost-effective manner. In keeping with our goal for financial sustainability, we prioritized events that would appeal to a broader audience and help us break even, which was usually at the 50 attendees mark.

Content planning

We conduct feedback surveys after each event and one of the questions asked is around future topics of interest. The feedback from the previous board year is shared with new board members/portfolio VPs to help them with content planning. Based on the survey analysis, the most commonly requested PD topics for the 2017-2018 board year were:

- Social media and digital trends
- Internal communications and employee engagement
- Starting a new business or career
- Business/non-core communication topics

In a large city like Toronto, we are competing for share of wallet and share of interest from other associations like the Canadian PR Society, Toronto chapter and the Canadian Marketing Association, as well other industry conferences. We make our best effort to avoid major conflicts by maintaining a chapter calendar that includes internal and external events as well as holidays and special occasions. Funnel, our association management company, has ownership of the chapter calendar and shares it with the entire board every two weeks. They also proactively flag conflicts and concerns as they arise. We also discuss upcoming events and proposed speakers at monthly board meetings so that all VPs are aware of what's happening and when.

Marketing our events

The chapter promotes all events through multiple channels:

- e-Lert biweekly newsletter (4,050+ subscribers)
- Chapter website home page and events page (1,050+ visits per month)
- Facebook company page (980 followers)
- LinkedIn company page (848 followers)
- Twitter (10,000 followers)
- Dedicated email promotion (4,050+ subscribers)
- Mention of upcoming activities at chapter events

Our analysis of post-event surveys and registration data shows that e-Lert and email is the most effective channel for driving ticket sales, followed by word of mouth and the chapter website. While social media is great for creating awareness, the click-thrus from social media don't drive sales. As a result of this, we promote all PD events in at least two issues of e-Lert and one dedicated email; the latter is usually used for "last call to register" type communication. This is supported by ongoing social media promotions scheduled as soon as the event goes live on the website. Either the Communications portfolio volunteer or Funnel prepares creative and visually-appealing event banners for use on our digital channels.

Program Implementation

With the member survey for reference and direction, we implemented our PD strategy through various board portfolios as follows.

Events:

We organized four in-person PD events for audiences with broad interests, members and non-members, and meeting the needs across all levels of the career roadmap. We typically get equal number of members and non-members, depending on the nature of the topic. This year, we had slightly more non-member attendees due to the broad appeal of the topics offered. We also had diverse panels with 50-50 male/female representation.

Strategic Partnerships:

We explored partnerships with external organizations to provide access to events and speakers of interest to our members, particularly in areas where the chapter didn't have capacity to create its own PD event. We partnered with three industry conferences that offered our members 15-20% discount on registration. We also negotiated an agreement with workshop provider CampTech to offer member discounts on in-person half day and full day workshops on improving their technical and digital skills. These discounts were exclusively for members.

Professional Independent Communicators (PIC):

This portfolio organized in-person and online learning for independent communicators or those running their own business. The attendees are primarily members but with some non-members attending depending on the topic of the event. In the previous board years, PIC PD events were offered free of charge and subsidized by other chapter programs. However, given the goal of financial sustainability it was important that these events generate enough revenue to cover venue costs.

Programs:

The Programs portfolio organized the Communicator of the Year (COTY) breakfast, which is an in-person PD event for senior-level communicators, both members and non-members. Typically, more non-members attend this event as the breakfast honors a senior executive from the Greater Toronto Area who demonstrates excellence in communication. The honoree gives a keynote speech, usually on a business topic that would be relevant to communication professionals. This year's breakfast honored, Masai Ujiri, President of the Toronto Raptors (NBA team). He gave a keynote speech about his career journey in the NBA, with a focus on building a winning culture as a leader, applying lessons from sports to the business world.

Communications:

We regularly promoted IABC HQ webinars, World Conference, IABC Academy courses and certification through the chapter's e-Lert newsletter, which has over 4,000 subscribers that include members and non-members.

Annual General Meeting:

This year, we also incorporated PD into our Annual General Meeting as a value-add and thank you to our members. Daniel Tisch, President of Argyle Public Relationships and past chair of the Global Alliance for Public Relations and Communication Management, presented a keynote speech on the current status of the industry and future trends in PR. It was very well received, resulting in 100% positive rating in the post-event feedback survey.

Challenges

The VP, Events was new to the board this year and started a new job shortly after joining the board. This resulted in a delay in starting our programming for the year and we weren't able to plan or promote events too far in advance. Plus, one of the PD events didn't break even, although it received a high positive rating. In addition, the Cision sponsorship grant/bursary offered through the IABC Canada East Region expired on December 31, 2017 and we were told in February 2018 that it would not be renewed. These factors combined impacted our revenue targets for events.

We knew at the mid-year point that we wouldn't meet our event revenue, so we focused on optimizing spend in the second-half of the year by reducing expenses related to the OVATION Awards Gala and cutting back non-essential spend in other portfolios.

Goals, objectives and measurement

Each portfolio set its SMART objectives and measures of success, but the expectation was to align these objectives to the overall chapter goal of maintaining our financial health with a view to long-term sustainability. Each portfolio uses the previous year's results as the benchmark for goal setting.

Portfolio	Objectives	Results
Events	<ul style="list-style-type: none"> • Maintain 80% positive review rate in post-event surveys. • Support the chapter's financial sustainability by ensuring the events portfolio recovers all costs for events on an annualized basis. • Maintain overall attendance levels from following year – (150 attendees over the course of the year) 	<ul style="list-style-type: none"> • Delivered 4 PD events with all except one operating at break even. • Total of 328 attendees for the year at in-person PD events; 42% members and 58% non-members. • The three events that had high or sold-out attendance featured top topics identified in our feedback survey: <ul style="list-style-type: none"> • Engaging a multigenerational workforce through effective communication (68 attendees; 34% members, 66% non-members) – achieved over 90% positive rating • State of Social Media + Corporate Communications (102 attendees; 52% members, 48% non-members) – achieved 90% positive rating • Career conversations with leading Toronto communicators (59 attendees; 53% members, 47% non-members) – achieved 79% positive rating • Our 4th event, “Terry Fallis on his path from PR to publishing,” did not break even from a revenue perspective (44 attendees vs 50 targeted; 80% members; 20% non-members), but it did achieve an 87% positive rating.
Strategic Partnerships	<ul style="list-style-type: none"> • Generate 1-2 other partnerships to drive member value by offering discounted rates, an opportunity to win a free pass and branding/promotional opportunities for the chapter. 	<ul style="list-style-type: none"> • Partnered with 3 external conferences to offer member discounts during the board year: <ul style="list-style-type: none"> • Global PR Summit Canada 2 (November 2017) • The Change Leadership Summit (May 2018) • Leaders & Icons Conference (May 2018) • Negotiated an agreement with CampTech, which offers in-person workshops on technical skills, to offer discounted rates for IABC

		members from January to June 30, 2018, and provided CampTech \$50 gift cards as door prizes at chapter events.
Professional Independent Communicators (PIC)	<ul style="list-style-type: none"> • Generate revenue from PD events and deliver cost-effective programming. • Maintain attendance of 120 attendees for the year. 	<ul style="list-style-type: none"> • PIC organized five PD events that were well attended (123 total attendees for the year) and generated \$1,735 in revenue. • While PIC events didn't break even, PIC was able to deliver cost-effective programming by using a low-cost venue. <p>Topics covered in events:</p> <ul style="list-style-type: none"> • Learn the ABCs of SEO to improve your search ranking (26 attendees; 58% members, 42% non-members) • Carving your own path to work fulfillment (16 attendees; 65% members, 35% non-members) • Webinar – Building your business in an ever-changing PR world (18 attendees; 83% members, 17% non-members) • Crushing corporate video content: What you need to know for today and tomorrow (31 attendees; 42% members, 58% non-Members) • What communicators need to know about podcasting in 2018 (32 attendees; 56% members; 44% non-members)
Programs	<ul style="list-style-type: none"> • Maintain attendance of at least 90 attendees. • Deliver at least \$4,500 in revenue, using the previous year's budget as a benchmark. 	<ul style="list-style-type: none"> • The selection of a senior executive with experience in business and sports meant that attendees got to hear a different leadership perspective. • The COTY breakfast had 108 attendees (45% members; 55% non-members). • According to the post-event survey, 60% of attendees had more than 13 years of experience in communication. • The event generated over \$5,400 in revenue. • The honoree's speech received 85% "high satisfaction" rating.
Communications	<ul style="list-style-type: none"> • Promote IABC HQ professional development opportunities in chapter newsletter on a regular basis. 	<ul style="list-style-type: none"> • Included content about PD and certification in at least one e-Lert issue per month. • This content received total clicks of 464 for the year (13% click-thru rate), with webinars and certification as the most popular topics.

Budget

Budget process

- Each board member was required to develop a strategic plan for his or her portfolio with an accompanying budget. That budget identified the expenses, revenues, office hours and sponsorship dollars that would successfully support their strategic goals. To get some insight in making those financial estimates for the year ahead, they refer to the actual costs and revenue from the previous year.
- The VP, Finance and Association Management reviewed individual portfolio budgets. For the above portfolios that had incorporated events as part of the PD, the expectation was set that all events must break even at a minimum and generate revenue, if possible.
- Since we had a sizeable surplus from the year previous (\$33,242), we felt comfortable budgeting for a loss in 2017-18. Given that the chapter had not invested in various chapter activities over the past few years, we felt the time was right to focus on enhancing and updating our member-based initiatives and other programs to enhance member value.
- While we had budgeted for PD within our event-related portfolios, communication and strategic partnership activities, such as advertising promotions for events (\$3,000), were subsidized through the above investments.

Budget breakdown and analysis

As PD is not a standalone portfolio, funds for PD-related events were allocated within specific portfolio budgets. Below is a breakdown showing budget vs. actual.

Portfolio	Budgeted Revenue	Actual Revenue	Budgeted Expense	Actual Expense
Events	\$20,000	\$15,505.70	\$26,000	\$12,380.64
Programs	\$4,000	\$5,492.50	\$5,000	\$5,454.16
PIC	\$2,700	\$1,735	\$2,775	\$1,633.26
Total	\$26,700	\$22,733.20	\$33,775	\$19,468.06

Budgeted Loss (Revenue less Expenses): \$7,075

Net Profit (Revenue less Expenses): \$3,265.14

Despite the challenges faced in event delivery (outlined earlier), by keeping a tight control over our event expenses, we were able to deliver a net profit of \$3,265.14 from PD-related activities.