



International Association
of Business Communicators
Canada West Region

CHAPTER ONBOARDING MANUAL

2020-2021



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Welcome Message

The Canada West Region (CWR) of IABC serves chapter leaders from the six western Canadian chapters by facilitating the exchange of information, ideas, and resources throughout the region, and by providing leadership training. The region represents member interests at other levels of the association; and promotes professionalism through programs offered in chapters, in the region, and globally in conjunction with other IABC regions.

An ongoing task of CWR, in line with this mandate, is to investigate what resources are needed by individual chapters and leaders every year. The results of our poking and prodding are sometimes timely and unique, but more often, they are thematic and recurrent. Every year, the CWR board supports financial management, recruitment/retention issues, performance conversations, etc. Rather than re-source best practices and information year-after-year, the Region maintains this manual.

The manual is to support the development and proper function of our chapters, through onboarding and orientation of its future leaders. Future CWR boards will be tasked with reviewing and updating timely information contained herein, however most of the information should remain current and useful.

IABC continues to represent excellence in all business communication professions. As leaders, our role is to maintain that standard, and help worldwide communicators collaborate and grow together. We do this for the benefit of our professions and to help all the organizations we support achieve their business goals.

Will Tigley
2020-21 Chair
IABC Canada West Region



Chapter Onboarding Manual Updates

This manual will be updated on a yearly basis, coinciding with the start of each board year. Should you have any questions or find information which needs to be updated, please contact the CWR Leadership Director at cwr-ld@iabc.com.

Most links can be found within the IABC family of websites, including the IABC Leader Centre. However, if you are having any issues or receiving an error message, please contact the CWR Leadership Director at cwr-ld@iabc.com.

IABC International

Role of International

As a member-based organization, the International Association of Business Communicators exists to serve its members, and the vitality of the communication professions. The International staff and International Executive Board (IEB) exist to support the work of regions, chapters and serve members with major programming and services.

At the international level, the organization is led by an executive director, as well as a core staff that maintain the administration and proper operation of IABC. In 2020, IABC is being transitioned to an association management company (SmithBucklin). The implications and logistics will be elaborated over 2020-21. The main goal is to maintain service to members, and focus resources on maintaining membership and financial resources in the short term. IABC is also supported by the dedicated work of several committees.

Permanent IABC committees include:

- Ethics committee
- Finance committee
- Audit and risk committee
- Investment committee
- International Executive Board nominating committee
- Fellows committee
- Council of regions
- Awards committee
- Foundation fundraising committee
- World Conference program advisory committee
- Academy committee
- Global Communication Certification Council
- Leadership Institute Program Advisory Committee

The majority (2020: approx. 79.5%) of individual and corporate member dues go to the International organization to maintain administration and operations. The remaining dues are split between regions (2020: approx. 7.5%) and the chapters (2020: approx. 13%) for local programming and services.

Notable programming ensured by International staff, the IEB and Committees include:

- [Gold Quill Awards](#)
- [World Conference](#)
- [IABC.com](#)
- [Leadership Institute Conference](#)
- [IABC Academy](#)
- [IABC Fellows Program](#)

CWR is always ready to support chapters accessing international leaders and staff. Connect with your board buddy if you need some assistance.

IABC World Conference

The [IABC World Conference](#) is a long-standing, global professional development event designed for communication practitioners. The only major conference of its type, the event draws over 1,300 attendees from around the world. Speakers are selected through a peer-reviewed process, with evaluations conducted by top experts in the field. Selections are based on alignment to the IABC [Global Standard](#) and the degree to which the sessions will inform, engage and deliver on the conference theme.

By attending the IABC World Conference, attendees can:

- Expand their professional network, with more than 1,300 participants in attendance.
- Experience outstanding keynote speeches and informative panel discussions.
- Choose from exceptional sessions in a variety of formats and categorized by Career Path:
 - Leadership and Strategy
 - Marketing and Brand
 - Reputation
 - Employee Engagement
 - Communication development
 - Gift of Communications – give pro-bono advice to a local charitable organization
 - Regional receptions
- Earn credits toward professional certification.
- Take a certification exam.
- Attend the organization’s Annual General Meeting.
- Share innovative knowledge, creative tools and critical connections which make communication the centerpiece of a thriving business community.

The conference typically runs for four days, with an opening reception the evening before the opening day. Throughout each day, you can find a selection of professional development sessions with speakers from around the world. Each evening includes a special event, from the opening session to dine-around (networking dinners organized by local chapters) and ending with the Excellence Gala. The conference also hosts morning meet-ups (yoga, scheduled runs, etc.) as well as plenty of networking time throughout the conference.

Look out for the IABC World Conference Brief, the official e-newsletter for the IABC World Conference event. This provides IABC members with session and conference updates. This is an excellent tool to use to promote to your members through social media.

World Conference App – Download the app, available each year to IABC World Conference registrants. Have your schedule, create a profile and view any announcements for the conference on your mobile device. Don’t forget to engage with other conference registrants.

IABC Leadership Institute

The [Leadership Institute \(LI\)](#) conference is an opportunity for IABC chapter, regional and international leaders to come together in order to share best practices and learn how to create programs and services that keep members active and involved. Unlike the World Conference, which welcomes members and non-members, LI is exclusively offered to IABC leaders. It’s a fantastic



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opportunity to network with fellow leaders, build strong relationships and learn new skills useful in your IABC position and beyond. LI is held in February of each year (locations change each year).

Connect: Meet with IABC chapter leaders from around the world.

Leadership Development: Session speakers/discussions from IABC leaders which you can apply to your chapter or region.

Network: Meet and build relationships with other IABC leaders. This network is valuable throughout your executive leadership journey.

Experience: Experience a new city and join in for the activities outside of the conference with your fellow IABC leaders. Experience new culture, food, music and create new friendships.

Social: Stay engaged throughout the LI conference. #WeLeadIABC #IABCLI #Leadchange

The CWR board covers the expenses for the Chair and Vice Chair to attend LI each year. When finances allow, additional executive may be funded to attend.

Leadership Institute Chapter Grants

- The CWR board provides each chapter with a grant to help with the expense of sending a chapter board member or two (usually the President and/or VP and/or the incoming VP), to attend Leadership Institute. Currently, the grant covers up to \$1,500 of eligible expenses, per chapter.
- The chapter boards receive this grant by submitting an expense claim to the CWR finance director that includes the eligible travel expenses (see the travel policy for details) along with receipts following the conference. Like for Dare to Lead, it's preferable to submit all of the expenses, even though only the amount up to the grant will be paid. This allows the region to monitor the effectiveness of the grant compared to actual costs.

IABC Chapter Management Awards (CMA)

The Chapter Management Awards (CMAs) are celebrated each year during the annual Leadership Institute conference (February). Entries are submitted between October and December of each year, and the International Chapter of the Year from the previous year serves as the evaluators for the entries. Chapters will find success in planning for the CMAs throughout the year, reducing the time pressure during the submission window.

CMA categories:

- Communication Management
- Community Involvement
- Event Management
- Financial Management
- Leadership Development
- Membership Marketing
- Professional Development
- Sponsorship
- Student Involvement
- Strategic Planning



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Chapter Division

- Division 1: Large chapters (201 or more members)
- Division 2: Medium chapters (76 to 200 members)
- Division 3: Small chapters (15 to 75 members)

Entries that are scored between 5.25 and 5.74 on a scale of 7 receive an Award of Merit and entries scored between 5.75 and 7.0 receive an Award of Excellence. Please note that both Merit and Excellence winners receive a commemorative award and there can be multiple winners in each category.

Chapters can use the categories above as inspiration when planning their programs and chapter management for the year ahead. The CMAs are a great way to have your chapter recognized for its outstanding efforts and share your chapter's best practices with other leaders! Check out the [CMA page on Leader Centre](#) for complete details about the CMA program and to view samples from previous winning chapters.

Review the [IABC CMA Manual](#) for details on the awards and help with submitting an entry.

IABC Policy Manual

IABC creates an annual Policy Manual which is posted online for all members to access. This manual is for you, if you're stepping up to lead at the local, regional or international level. It is in addition to the many resources available to you on the [IABC Leader Centre](#).

Specifically, this Policy Manual serves to clarify procedures and policies that support IABC's Bylaws. This document does not repeat the content of the Bylaws, but rather is a companion piece to them. The International Executive Board (IEB) approves the Policy Manual and a fresh version is made available annually.

[IABC Policy Manual](#) – You can access information on IABC Membership details (fees and dues), Organizational structure, IABC Foundation, IABC international board and committees, Code of Ethics, and Finances. This is a great resource for learning more on the polices and background of IABC.



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IABC Code of Conduct

The IABC Code of Conduct sets forth expectations for all attendees and participants—including members, speakers, vendors, media representatives, exhibitors, sponsors, volunteers and staff (all “participants”) at virtual or face-to-face IABC events.

As a professional communicator, we have the potential to influence economies and affect lives. This power carries with it significant responsibilities. As a professional association, the International Association of Business Communicators must show due diligence in enforcing the sound, ethical and legal judgment of our members in our professional decisions, actions and consultations.

Therefore, IABC requires its members – and encourages its professional colleagues and those in allied professions who are not members – to be thoughtful about and exhibit ethical behavior in all aspects of professional decisions, actions and consultations.

The purpose of IABC’s Code of Ethics is to proactively guide members regarding consistent, responsible, ethical and legal communications.

Code of Ethics for Professional Communicators

1. I am honest—my actions bring respect for and trust in the communications professions.
2. I communicate accurate information and promptly correct any errors.
3. I obey laws and public policies; if I violate any law or public policy, I act promptly to correct the situation.
4. I protect confidential information while acting within the law.
5. I support the ideals of free speech, freedom of assembly, and access to an open marketplace of ideas.
6. I am sensitive to others’ cultural values and beliefs.
7. I give credit to others for their work and cite my sources.
8. I do not use confidential information for personal benefit.
9. I do not represent conflicting or competing interests without full disclosure and the written consent of those involved.
10. I do not accept undisclosed gifts or payments for professional services from anyone other than a client or employer.
11. I do not guarantee results that are beyond my power to deliver.

IABC Academy and Certification

IABC Academy

The IABC Academy is the brand for all professional development programs at IABC. Offerings are aligned with the Global Standard and the certification programs from the Global Communication Certification Council (GCCC).

The [IABC Academy](#) provides online professional development for business communicators to help advance their careers and generate real business results for their organizations. The online workshops offer in-depth learning to build critical skills and knowledge. Through live, on-demand and self-paced workshops by leading experts in their fields, IABC Academy participants get exceptional instruction that supports long-term problem-solving and enhances career growth, now and into the future.

Connect with the strategic insights, skills and information to drive tangible business results. The IABC Academy is here to help members meet those goals and take their career to the next level, offering online learning in the following formats:

- [Live workshops](#) - online courses with a live instructor
- [On-demand workshops](#) - live workshops released at a later date to be completed
- [Self-paced courses](#) - professional development can be completed online anytime, anywhere
- [Learning Paths](#) - multiple courses bundled together and offered at a discount

Academy Courses fall within one of the five following categories:

- Research and Analysis
- Strategy and Engagement
- Consistency and Strategic Implementation
- Measurement
- Special Topics and Trends

Supporting Certification

The IABC Academy offerings closely align with the Communication Management Professional (CMP) and Strategic Communication Management Professional (SCMP) certifications developed by the Global Communication Certification Council.

How Learning is Delivered

Led by global experts and industry leaders, IABC Academy workshops use the Web-Ex or Go-to-Training platforms for instructional delivery. Links to the recordings for on-demand workshops are provided in the course. Registration for on-demand workshops includes related web recordings and handouts to access anytime.

IABC Certification

The [Global Communication Certification Council](#) (GCCC), a team of communication professionals assembled by IABC’s international executive board, has developed two certifications: the Communication Management Professional (CMP) certification and the Strategic Communication Management Professional (SCMP) certification.

- The **Communication Management Professional** (CMP) certification is aimed at the generalist/specialist level, a mid-level stage in the communication professional’s development, for those with 6-8 years of experience in the communication field.
- The **Strategic Communication Management Professional** (SCMP) certification is aimed at the senior level, a higher-level stage in a communication professional’s career, for those with 8–11 years of experience.

The GCCC operates independently of IABC.

The CMP and SCMP certifications, including the continuing professional development requirement, are based on the [Global Standard](#) for communication professionals set forth by IABC. Applying that standard enables the GCCC to cross all borders, align with diverse cultures, and effectively serve organizations of all types and sizes.

The Global Standard was developed by IABC through research and consultation with the wider profession and states that “communication professionals around the world embrace a shared career purpose and six core principles as the building blocks of their work.”

Those principles are:

- Ethics
- Strategy
- Analysis
- Context
- Engagement
- Consistency

Achieving certification from the GCCC shows that members have professional competence in all these principles.

Promoting Certification for Local Chapters

- Certification is a key component of having a professional association. Promoting certification champions the notion that communicators possess a specialized business skill.
- Consider advertising the certification program regularly at events and beyond.
- Consider setting up a group to shepherd members through the process. The group could meet to go over concepts and ideas tested in the exam.
- Host exams at the chapter level to make it easier for members to become certified.
- Promote success of members who have passed exams at chapter events. Acknowledge them appropriately through a ceremony or presentation at professional development events.
- Involve employers; with permission of members, you may want to consider writing letters to the employers commending members on the certification achievement.
- Consider developing a program so that employers are encouraged to support the member with costs of writing exams, etc.
- Note that International has many resources to help you support and promote certification.

GCCC Toolkit and Marketing Resources

- [Key Messaging](#) – A source for social media, web content or general marketing wording to promote the Certification with proof points.
- [Marketing Flyer](#) – A quick one-page document about the GCCC certification and career benefits.
- Watch or share the [Promotional Video](#) on GCCC certification.
- [Social Media Graphics](#) – Four graphics to post on social media for career benefits with having a certification.

Host an Exam

The Global Communication Certification Council invites IABC chapters and regions and independent organizations to apply to host administrations of its certification exams. To apply to be considered as an exam host and help bring GCCC certification opportunities to your area, please complete an application [here](#).

International Standards Organization (ISO) recognition

The CMP certification is in formal evaluation to be recognized by ISO, bringing it to the same level of credibility as other certifications for accountants, engineers, etc. The SCMP certification will then be submitted for evaluation.

IABC Additional Resources

Resources

The IABC website offers numerous resources for members to access information on current trends and discussions in communications. As a leader for your chapter, you should be familiar with the IABC.com website and its offerings.

- [Articles](#)
- [Books](#)
- [Podcasts](#)
- [Videos](#) (educational)
- [Case Studies and Research](#)
- [Webinars](#)

IABC Job Centre

The Job Centre features [Business Communication Jobs](#) from around the world. Member login is required to access details on most positions.

Local chapters also offer job postings on their chapter website (for public or member-only access) which local organizations can purchase through their local chapters. On average in the Canada West Region, chapters charge \$100 for a local job posting (2019).

Communication World and Catalyst Magazines

[These](#) are the IABC magazine, a publication for communication professionals worldwide. In 2019, the print version of the magazine was relaunched and rebranded as Catalyst Magazine. It covers the latest in communication trends, practice and research through in-depth reports, how-to articles and insightful interviews. The future of the print version is being considered in 2020.

Miscellaneous Resources

- [IABC promotional items](#) – Looking for gifts or prizes for the next chapter event? Shop online for IABC gear.
- [Events](#) – A listing for worldwide events are available for all members. It is encouraged that you attend an IABC event while travelling. Call the local chapter to see how you can obtain a ticket to their event.
- [Renew](#) – Renewal of memberships is easy through the IABC website. It is encouraged that members take the time to update their years of experience and profile details each year during their renewal.



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IABC International Contact List

The International Executive Board (IEB) is the governing body of IABC and is accountable to its members. [A current list of IEB members](#) can be found on the IABC website.

(Updated March 2020)

Executive Staff

Janet Rapp (SmithBucklin) – Executive Director

As IABC transitions to an association management company, staff rearrangement will take place. In the meantime, continue to reach out to Micayla Felicion-Davin as the chapter relations manager. The Region can also help navigate the current situation.

IABC Marketing and Brand Management

IABC Brand Management

In June 2015, IABC unveiled its new brand. The new logo represents the “globe” that is IABC, with the openness of the letters running over the edges of the circle, representing the values of transparency of communication, connection and community that IABC holds dear. But the new brand is far more than just a logo, it’s a confirmation and restatement of the values of IABC and its members.

IABC Shared Values

IABC’s shared values are principles that help define the culture and behavior of an organization and its members. The values define what makes our association unique, but also allow us to build further on these strengths.

- We represent the global profession.
- We create connection.
- We are a diverse community.
- We focus on insights and results.

IABC Brand Personality

We are:

- Accessible – collaborative, supportive, consultative
- Open – transparent, direct, open-minded
- Lighter – fun, friendly, welcoming
- Contemporary – current, leading-edge
- Professional – effective and efficient

IABC’s tone of voice is human, open, confident and professional.

Brand Identity Guidelines – These brand guidelines will help you tell the IABC story consistently and powerfully around the world, while guiding key areas of visual identity along with tone of voice for all your chapter communications. The guidelines have the following information:

- Tone of voice
- Logo (usage and design)
- Colors
- Images
- Social media examples

Marketing Tools and Resources

[IABC Communication Calendar](#) – IABC has set up a communications calendar to give chapters a better idea of the electronic communications that HQ is planning to send and when. Chapters can use this to plan the best days to send communications to members and to highlight what is being sent from HQ. IABC HQ does not send emails on Mondays, so that chapters and regions have an open day for membership communications.

[Logos](#) – here is a link to all IABC logos in Google Drive. This is a great resource for social media or blog posts to. *Note: This link connects to a google doc, if you are having issues access google docs, please contact cwr-ld@iabc.com.*

[Banners](#) – If your chapter would like to use templated designs to order your own banner, you can [access the design files here](#) or you can request to borrow the banners for your event, using the attached [request form](#), submitting it to leader_centre@iabc.com, and covering the cost of shipping.

Membership Marketing Resources

Note: If you are having issues accessing these links, please contact cwr-ld@iabc.com.

[March is Member Month](#) at IABC. On the Leader Centre, there are several resources for promoting Member Month to your chapter:

- [Member Month overview](#)
- [Sample social media posts](#)
- [Graphics](#) (great for social media posts and graphics with no logos)
- [Communication plan](#)

At the Leader Centre, you can access resources for membership marketing such as:

- [Membership brochure](#)
- [Student memberships](#)
- [Professional members](#)
- [Corporate members](#)

Looking for [more membership marketing ideas](#)? Don't forget to go through the last few years of Chapter Management Award winner submissions. Not only will you get ideas that have proven successful, but also ways to implement a marketing plan. Feel free to reach out to the chapter to find out more information or how you can implement their marketing tools/ideas for your chapter.

- [IABC Ottawa](#) won CMA Excellence in 2019 for Membership Marketing
- [IABC Newfoundland & Labrador](#) won CMA Excellence in 2019 for Membership Marketing
- [IABC Orange County](#) won CMA Excellence in 2017 for Membership Marketing

The Hub

The Hub is an exclusive online community designed for IABC members to network, collaborate, share resources and much more. The discussion forums are open for members to post when they want to seek perspective, offer insights and support colleagues who may post questions. Through mutual sharing of expertise, tools/resources, challenges and insight, we become stronger professionals and a stronger community. As the community grows over time, so will The Hub's library of templates, case studies, presentations and thought leadership content.

If you haven't already, check out [The Hub](#), create your profile and start connecting with other IABC members and leaders from around the world today.

Tips for Using The Hub

- Check out the [FAQ section](#) to find some helpful answers to The Hub and creating your profile.
- Discussion Group Etiquette:
 - State concisely and clearly the topic of your comments in the subject line. This allows members to respond more appropriately to your posting and makes it easier for members to search the archives by subject.
 - Send messages such as "thanks for the information" or "me, too" to individuals, not to the entire list. Do this by using the "Reply to Sender" link in every message.
 - Do not send administrative messages, such as "remove me from the list," to the group. Instead, use the web interface to change your settings or to remove yourself from a list. If you are changing email addresses, you do not need to remove yourself from the list and rejoin under your new email address. You can simply change your settings.
- Use caution when discussing products. Information posted on the discussion groups and in the libraries is available for all to see, and comments are subject to libel, slander, and antitrust laws.



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Stay Connected with IABC Virtual Communities

Join the conversation for easy ways to follow timely discussions that matter. IABC offers several online communities for members to engage. Have your chapter join or follow these IABC groups to add more content to your social feeds or use content from these communities to augment your website and newsletters.

[IABC.com](#) – This website is a comprehensive resource for everything you need to know about IABC.

[IABC Weekly Digest](#) – An example of the weekly email update for all members; highlighting news, upcoming events, resources, professional development and more. If you want to add something to the weekly newsletter, contact news@iabc.com.

[IABC YouTube](#) – Includes over 140 videos, plenty of information to view and share.

[IABC Facebook](#) – Join, like or befriend the IABC Facebook page to see what is new and exciting around the world with connections to IABC chapters.

[IABC Twitter @IABC](#) – Connect and share with IABC, with over 36,000 tweets, there are bound to be a few stories or news articles for the chapter to share or add to your local Twitter feeds.

[Twitter #CommChat](#) – This takes place every third Wednesday at 9 a.m. (Pacific time). Join the conversation of trends and best practices in the communication profession. View the [IABC website](#) for dates and topics of each #CommChat.

[IABC Instagram @iabc snaps](#) – Share photos from local chapters or with international chapters.

[IABC LinkedIn](#) – Connect with IABC on LinkedIn to share events, blogs, chapter updates and volunteer recruitment. IABC LinkedIn has several groups, including local groups for members to join and be a part of the IABC community.

IABC Common Hashtags

#comms #communication #socialmedia #engagement #strategy #PR #HR #commsstrategy

#copyediting #usability #WebWriting #analytics #Leadchange #leadership #contentstrategy

#digitaltransformation #socialskills #digitalcomms #mentoring #bestpractice

#CreateConnection #MyIABC #IABC #WeLeadIABC #IABCLI #webinar #diversity

#futureforward2019 #IABC19 #ExpandYourImpact #certification #careerforward

#IABCjobcentre #commchat



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IABC Canada West Region Virtual Communities

Canada West Region

Canada West Conference

[Twitter](#)

@iabc_cwr

[Twitter](#)

@IABCCANWEST

[Facebook](#)

IABC British Columbia

[LinkedIn](#)

[Twitter](#)

@IABCBC

[Facebook](#)

@iabcbc

[Instagram](#)

@iabc.bc

[YouTube](#)

IABC Edmonton

[LinkedIn](#)

[Twitter](#)

@IABCyeg

[Facebook](#)

@iabc.edmonton

[Instagram](#)

@iabcyeg

[SoundCloud](#)

IABC Calgary

[LinkedIn](#)

[Twitter](#)

@IABCyyc

[Facebook](#)

@iabc.calgary

[Instagram](#)

@iabcyyc

[YouTube](#)

IABC Saskatoon

[LinkedIn](#)

[Twitter](#)

@IABCSaskatoon

[Facebook](#)

@IABCSaskatoon

[Instagram](#)

@iabcsaskatoon

[YouTube](#)

IABC Regina

[LinkedIn](#)

[Twitter](#)

@iabcregina

[Facebook](#)

@IABCRegina

IABC Manitoba

[LinkedIn](#)

[Twitter](#)

@IABCManitoba

[Facebook](#)

@IABCManitoba

[Instagram](#)

@iabcmantoba

IABC Canada West Region (CWR)

CWR Mission and Mandate

IABC Canada West is one of eight IABC regions internationally, one of two regions in Canada and represents and supports six IABC chapters and their leaders, including IABC/BC, IABC/Calgary, IABC/Edmonton, IABC/Regina, IABC/Saskatoon and IABC/Manitoba.

IABC Canada West Region supports the IABC mission as stated in the IABC bylaws and Policy Manual by: serving region members, primarily through providing guidance, support, and development opportunities for chapter leaders; fostering region growth; and serving as a communication conduit between chapters and the IABC Executive Board as a representative on the Council of Regions or other representative body as may be defined from time to time by the IABC Executive Board.

Mandate: IABC Canada West Region serves the following constituencies:

- (a) Chapter and Region leaders.** The Region serves leaders by facilitating the exchange of information, ideas, and resources throughout the Region, and by providing leadership training.
- (b) Members at Large.** The Region serves as a liaison between IABC members-at-large and the IABC international headquarters.
- (c) Members of IABC Canada West Region.** The Region serves its members by developing the communication, leadership, and management skills of Chapter and Region leaders; representing member interests at other levels of the Association; and promoting professionalism through programs offered in chapters, in the Region, and in conjunction with other IABC Regions.
- (d) IABC Executive Board and the Association at large.** The Region serves the IABC Executive Board and the association at large by encouraging chapter and region leaders to take part in policy development at all levels of the association; ensuring a timely and consistent flow of information and ideas between the Region and the IABC Executive Board through participation in the Council of Regions; and providing a pool of qualified, dedicated leaders to serve the interests of the association at large.

Robert's Rules

While not a requirement unless stated in chapter bylaws, a governance system will greatly help you keep meetings on-time and on-track. The CWR Board uses Robert's Rules of Order, as does the International Board and many chapter boards worldwide.

- Watch this [video on Robert's Rules](#) – learn some tips on meeting interventions.

Buddy System

The CWR Board Buddy system is set up to provide 1:1 mentoring and coaching support for Canada West Region leaders. The buddy system is designed to be a first line of support for you, someone you can share ideas with, get advice from or generally reach out to at any point.

CWR Executive Board Buddies

Each director on the CWR board is assigned to the Vice Chair, Chair or Past Chair for mentorship and coaching. This semi-formal system is intended to help keep up to speed on progress, connect back to the strategic plan, better onboard new board members and bring up any issues or questions in a timely, more personal manner.

CWR Executive board buddy assignments are as follows:

Executive member	Portfolios
Past Chair	<ul style="list-style-type: none"> • National Programs • Leadership Development
Chair	<ul style="list-style-type: none"> • Administration • Finance
Vice-Chair	<ul style="list-style-type: none"> • Communications • Professional Development/Sponsorship

Guidelines for Chapter Leaders and CWR Board Buddy System

Each chapter VP is assigned to a Board Buddy from the CWR executive board for the duration of their VP year.

CWR Board Buddy assignments are announced at the annual May in-person meeting and pairs are free to establish how and when they will connect with each other throughout the year ahead. Regularly scheduled check-ins are recommended (e.g. monthly).

We typically don't have time at monthly board meetings to cover board reports in detail, so items we don't get to at the board meetings can be a good starting point for Board Buddy check-ins. Other items for discussion may include issues or challenges chapter leaders are experiencing, brainstorming ideas, etc.



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Chapter executives are encouraged to implement a similar system to help support and engage their board. See [Chapter Governance](#) for more information.

2019-20 Board Buddies

British Columbia – National Programs	Manitoba – Finance
Calgary – Past Chair	Regina – Communications
Edmonton – Professional Development/Sponsorship	Saskatoon – Vice Chair

Grants

CWR provides three grants to the chapters it supports for yearly conferences.

Leadership Institute Grant

This grant is set at \$1,500 per chapter. The amount should be reviewed by the CWR Board every few years to see if it's adequate to help encourage chapters to send at least one delegate to Leadership Institute (preferably the incoming president, for them to build their global network).

Dare to Lead Hosting Chapter Seed Grant

CWR provides a grant to the chapter hosting Dare to Lead as seed money so that they won't have to be out of pocket for expenses that must be prepaid or incurred before registration revenue starts to flow in to the chapter. Typically, this cheque should be requested by the Leadership Development Director in August/September so that it's early enough to help the organizers and still stays within the appropriate fiscal year. As of July 2019, this seed grant is set at \$6,000.

NOTE: Any profit a host chapter makes beyond \$500 is split 50/50 between CWR and the host chapter.

Dare to Lead Chapter Attendees Grant

- The host chapter gets \$1,000.
- A chapter located in the same province gets \$2,500.
- Any out of province chapter gets \$3,250.

Dare to Lead schedule

Each year, Dare to Lead is hosted in a different CWR city, following the same recurring pattern:

- May 2020 – Winnipeg
- May 2021 – Saskatoon
- May 2022 – Calgary
- May 2023 – Vancouver



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- May 2024 – Regina
- May 2025 – Edmonton

Western Canada Conference

Since 2007, CWR has hosted a biennial conference. Previous conferences have typically been held in medium-sized communities seen as tourist destinations (Kelowna, Banff, Whistler, Victoria). IABC has a good reputation for conferences that provide value, worthwhile professional development and fun.

This conference is an opportunity to provide members and other participants with relevant, current knowledge about communication best practices and prepare them for leadership roles within their organizations and careers.

Primarily, audiences are members or non-members in the CWR region. However, invitations are extended to IABC members across Canada and from the northwestern or Pacific Plains Region of the United States. Typically, the conference attracts 150-200 attendees.

CWR and an outside company join together to run the conference (Swansea Communications in 2017 and 2019). The profit split is 55% CWR, 45% to the outside company. They provide us with a proposed budget that needs to be approved by the board.

By attending the CWR Conference, attendees will:

- Experience outstanding keynote speeches and informative panel discussions.
- Choose from exceptional workshops or breakout sessions.
- Earn credits toward professional certification.
- Take their CMP or SCMP exam.
- Network and create new friendships.

Visit the [IABC Canada West Conference](#) web page for more details, agendas and registration information.

Additional Tools Provided by the Region (Zoom, Survey Monkey, Slack)

The Region provides operational resources to support chapter management. These include accounts with Zoom to facilitate virtual connections across the region and Survey Monkey to measure chapter program and initiative measurement as an indicator of success, as well as a private Slack channel to keep a line of communication open with chapter VPs.

Zoom account

Account log in: URL: <https://zoom.us/>

Username/Password: Request from the CWR Board Secretary at cwr-admin@iabc.com

Instructions for use:



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From the top right-hand menu click "Sign in." Enter the username and password.

Choose "Meetings" from the left-hand side menu to set up new video conferences and start meetings.

Click "Schedule a New Meeting" to create your video conference. Enter the details into the form. When choosing the "Meeting Options" please be sure to turn on video and audio for both the host and attendees. Additionally, choose the option "Enable join before host." This will open up the meeting so that if someone logs on before the host, they will be admitted into the meeting without delay. It is very important that you do not click "Use personal meeting ID." Because this is a shared account, we want each meeting to have a unique ID number - to ensure there is no confusion between conference lines.

Once you have successfully set up a meeting, click on the meeting name. The meeting details will open. Just to the right of the "Meeting Attendees", you will see a link that says "Copy the invitation." Click the link and copy the meeting details contained within the pop-up box. You can then paste the meeting details into your communication with the meeting attendees.

When you need to start your meeting, log in, and from the My Meetings tab, you can select your meeting link and at the top right-hand corner you will see a button that says "Start this Meeting."

Questions:

Contact Jackie Sargent at: Jackie.sargent@outlook.com or Tamara Gale at tamara.gale@gmail.com.

Premium Survey Monkey

Account log in: URL: <https://www.surveymonkey.com/>

Username/Password: Request from the CWR Board Secretary at cwr-admin@iabc.com

Instructions for use:

Sign in by entering the username and password.

The system allows only two devices to access the account at any one time. When you log in, you will be asked to send a verification code to the email account on file, tamara.gale@gmail.com. Send the verification code, and then contact the CWR board secretary by email to request the code. Once received, enter the code into the system to gain access. Please note that there are several requests received each month, from users across the region, without visibility into who made the code request. It is the requester's responsibility to request the code and to contact the board secretary to facilitate access to the account.

Slack

Slack is a team collaboration tool for sending instant messages in channels (like a group chat), as well as direct messages to individual or small groups of users. Slack is used by organizations worldwide to help teams communicate and collaborate in real time.

CWR has an account and is providing a Slack workspace for our Exec and VPs to communicate with each other easily as a group. Slack is not meant to replace email, Box.com or Google Drive. Please do not use Slack to exchange any confidential information (e.g. member details).



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Note: The CWR account has limited message storage and both messages and files exchanged will expire. Please ensure you save anything that you receive via Slack that you may need for future reference.

Who will use the Private VP Slack Group?

The VPs along with the CWR Director of Leadership are the only ones with access to this private chat group. However, a “guest” may come into the conversation for a limited time to be able to answer any questions or to provide expertise on a specific topic. The CWR Director of Communications manages the Slack group and will be able to add or change the chat groups settings. The CWR Executive is part of the #random and #general channels, so if you wish to engage in a discussion with the CWR Executive, you can post to the general channel where they can view and respond. The CWR Executive does not have access to the Private VP Slack Group

How do I join the conversation?

You can access slack via a computer, or via your mobile device. There’s an app for slack that you can install in both cases, or you can access slack via a web browser. You will be asked to confirm your email address before having access to your account. Once you have access to Slack, you’ll see there is a General, Random and VPs “channel”. The VPs channel is dedicated for you and this is the one you should be regularly posting to. The General and Random channels are for the entire Exec team and VPs.

What if I already use Slack for work?

That’s great! You can toggle between your work Slack and the CWR workspace as follows (once you have joined the workspace using the instructions above):

From the desktop app: You will see the workspaces you have access to as a list of icons on the left vertical toolbar. Click the IABC icon to access the workspace.

From the mobile app: Click the home button in the top left of the screen, and then the icon that looks like four small squares. This will open a list of workspaces that you have access to.

How do I post in Slack?

Under “Channels”, select the channel that you wish to post to. VPs are recommended to use the VPs channel. Type your message in the message box and hit enter to post.

How do I send a direct message in Slack?

Under Direct Messages, click on the name of the person you wish to message. If the person’s name is not visible, or you wish to message more than one person in a private conversation, click the + button on the right-hand side of the toolbar.

Who do I contact if I’m having issues with Slack?

The VP Communications is the administrator of our Slack workspace. Contact cwr-cmns@iabc.com if you’re having issues using Slack.

CWR Contact Information



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The Canada West Region board consists of executive members and chapter representatives. Below is the general contact information for reaching any member of the Executive. For a current list of members, please visit the [CWR website](#).

Board Members

Chair – cwr-chair@iabc.com

Vice Chair – cwr-vicechair@iabc.com

Board Secretary/Administration Director – cwr-admin@iabc.com

Communications Director – cwr-cmns@iabc.com

Finance Director – cwr-finance@iabc.com

Professional Development/ Sponsorship Director – cwr-pd@iabc.com

National Programs Director – cwr-nationalprograms@iabc.com

Leadership Development Director – cwr-ld@iabc.com

Chapter Governance

Top FAQ for New Chapter Leaders

1. What are the elements of a strong IABC Chapter?

A strong IABC chapter provides value to members. It is financially healthy and has limited problems recruiting new members and volunteers to staff chapter jobs and board positions. The leadership team is motivated, accomplishing its goals and maintaining the health of the chapter. The strong chapter is engaged with membership through a variety of events and professional development activities. There is a strong culture of professionalism among the members of a strong chapter and the chapter is regularly applying for Chapter Management Awards (CMA) with a high rate of certified members. Members are visible in regional and international activities including [IABC awards programs](#).

2. Why is good governance important to a properly functioning IABC chapter?

Good governance encompasses many of the items compiled in this Orientation Manual. You should have plans in place for a steady migration of leaders on and off the board and there should be policies in place to manage volunteers. Financial management is orderly, governed by policies and is routinely assessed and checked to ensure that goals are being met and budgets maintained. Good governance also speaks to how meetings are conducted and how members treat each other when working on chapter business. Good governance helps with strategic planning and goal setting. CWR can help with all these aspects.

3. As an IABC chapter leader, what should be my priorities or areas of focus?

All chapter leaders should be focused on providing value to members. The chapter should have a strategic plan which will set a path that leads to chapter success. Board members should be united in their pursuit of this plan and should know how their portfolio interrelates with other portfolios. The president should help chapter leaders focus on financial considerations, PD activities and promoting certification and a steady schedule of events that will engage members and develop them as communicators. The president should also be alert to threats to chapter health by scanning for sharp drops in membership, or migrations from IABC to other

professional associations. Growing a solid membership base is key, as is maintaining value for members.

4. What are the signs your chapter is struggling?

Steady declining membership and attendance at chapter events are often the two most worrisome signs that a chapter is struggling. A decline in scheduled events is also a sign that there is possibly a leadership gap. Chapters struggling to fill leadership positions or filling them very late in the year is also a sign that the chapter is likely losing the attention and interest of its members. Chapter leaders can avoid these problems, or mitigate the trend by ensuring a leadership pipeline, and having a solid and effective succession plan in place.

5. How can you refresh your leadership pipeline?

Chapter members who become leaders are highly engaged upfront. Members want to associate themselves with something that works and provides value. However, the chapter would do well to organize the efforts of volunteers and find ways to keep them engaged for their term, and to consider future opportunities. Most leaders started out in smaller roles and find their IABC experience rewarding. Leading these volunteers with recognition and appreciation while providing new opportunities is, at its simplest, the best way to keep your leadership pipeline flowing.

6. How can you improve your chapter's finances?

The best way to keep chapter finances in order is to manage them professionally or as close to professionally as you can. Hire professionals to check your books. Have policies and adhere to them and ensure that chapter goals and program offering are aligned with financial capability. It is also important to develop new revenue streams and chapters should seek new revenue sources by exploring new kinds of events. Strive to create partnerships and have a strong sponsorships program.

7. How can you ensure your board focuses on items which are of strategic importance?

The board should have a plan and understand their individual role in it. It is beneficial to review the plan on an annual basis. Once a good strategic plan is in place, you can focus on the priorities articulated within it. The board will be able to consult the plan at all times, and there should be ample discussion at the beginning of the year so subsequent meetings can be used effectively to discuss the actual implementation of the plan.

8. How can you assess your leadership abilities and those of your fellow board members?

Seek continual feedback from peers. Contact the Canada West Region and seek help there. Generally speaking, within the IABC chapter leadership context, your peers will be willing to provide feedback. You can also measure yourself against your goals, or those you are responsible for as set out in the plan. If you are the president, you need to look at the overall health of the chapter. Is it trending positively or negatively in finances, membership or member satisfaction? Are your interactions with board members productive or are you in conflict a lot?

9. When should I terminate a board member's role on the board?

If a board member is not performing, or causing difficulties for others who are volunteering, you should consult with trusted advisors and make a decision quickly. Prolonging a difficult decision will be counterproductive. You must have a candid conversation with the volunteer. There may be compassionate dimensions, but generally, you are doing your chapter a disservice by keeping someone on who is taking a portfolio and not doing anything with it. Termination is

your duty to the chapter and to the other leaders who are willing to step up and do the work. This will be a recurring challenge for all chapter and region leaders in IABC. It is never easy, and always strategic.

10. How important is a sponsorship program?

A solid sponsorship program is key to financial growth. Sponsorships allow you to grow revenue and build the IABC brand in your community. The extra revenue can help the chapter extend its ability to provide PD and networking possibilities.

11. How can certification help our chapter and members?

Certification is important in that it affirms our professional status. IABC is a professional association and certification is key. A chapter should strive to foster greater certification rates and should endeavour to help chapter members get certified. In addition, certified members need to achieve a certain number of annual credits to maintain their designation, making them prime volunteers for your chapter. A toolkit has been developed by CWR for your convenience.

Board Positions, Recruitment and Retention

Board Positions

Most chapters have a range of board positions, however, there are a few main ones common to all chapters. Board leaders should not feel constrained by what other chapters have in place. They should be attentive to the size of the board and to the ability to recruit to positions. You may consider these as vice-presidents, managers or chairs. The title is not important. Think more on the scope of the positions and how they interact with other positions on the board. How are they accountable? What are the goals? How will you measure success?

Below are some common board positions/portfolio areas chapters have in place (ones in bold are fundamental for an IABC chapter).

- **President**
- **Past President**
- **Executive Administrator**
- **Finance**
- **Membership (recruitment/retention)**
- **Professional Development-Events**
- Marketing and Advertising
- **Communications**
- Volunteer Services
- Web and social media/Technology
- Sponsorship
- **Awards and Certification**
- Career Services
- Student Services
- Mentorship



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Boards of Directors of Canada West Region Chapters:

Manitoba: <http://manitoba.iabc.com/about/board-of-directors/>

Edmonton: <https://edmonton.iabc.com/about/our-board/>

Calgary: <https://iabccalgary.com/about-us/>

British Columbia: <http://iabc.bc.ca/about-iabc-bc/2019-2020-chapter-board/>

Regina: <https://www.iabcregina.ca/About/executive-board>

Saskatoon: <http://www.iabcsaskatoon.com/board-of-directors>

Onboarding

Depending on the structure of your board, you may see a turnover rate between 25 and 66% of your board members every year. A lot of the time, there will be little to no transition between outgoing and incoming members, which is why it is critical to give every new board member an orientation.

Format

In terms of timing, June usually marks Annual General Meetings, while September marks the beginning of program years. Accommodating for vacation, June-August is the perfect time to hold an orientation and onboarding.

In concept, a session in a rented room and with basic catering goes a long way to letting new board members know they have joined a professional organization in which they will be able to learn and thrive, while serving members. None of this should be expensive. Go to the library, get a free room from the workplace of a board member or the use of someone's patio or house, etc.

Be careful not to take up an entire weekend day, but rather a packed half day, or perhaps two more flexible half days on separate weekends. They will thank you for not monopolizing a whole day, especially if they have children, pets or other dependents at home. It will be important to involve the board members staying onboard. The new slate will have a new group culture and that has to be kicked off on the right foot.

Content

They should be given basic homework beforehand to at least have some foundational knowledge about the organization, the local chapter and membership, and what is generally expected of them in the coming year. Avoid assigning too much reading and give them the opportunity to outline their expectations.

In person, go over the chapter's strategic plan, key objectives for the year, and establish lines of communication between the board members. Formalizing a board buddy system is a great tool to make sure everyone feels valued, feels comfortable asking for help, and reports on progress regularly. This will also help senior leaders identify issues ahead of time.

Consider guest speakers locally or via videoconference. Ideally, this will be a past board member in your chapter (or in another chapter/region) that can share insight into their experience, what they wish they knew when they started, and what they got out of it. CWR board members are also available as a resource for speaking or help finding a speaker to fit your needs. Connect with the CWR Leadership Director for any assistance.

Finally, consider short sessions on two key process pieces that are not sexy, but will most certainly make the year go more smoothly: finances and meetings. For finance, all should know about costs they will incur and reimbursement processes throughout the year. This will also reduce the burden for the treasurer that comes with improperly filled requisitions. For meetings, give a short session on Robert's Rules of Order and outline how meetings will go in the coming year. Being able to keep meetings on track and ending on time will help a lot with attendance, retention and engagement.

Realistically

Remember that new board members may remember very little about the session, especially if it takes place right before the summer break. They should remember inspirational words from a guest speaker, and they should remember the new contacts they have just made between themselves. Give them a takeaway they can refer to for everything else.

Onboarding Resources

- [IABC 101 video](#) – an animated video to help new board members understand more about IABC.
- Review or pass along the [IABC Onboarding Toolkit](#) to all new board members. The toolkit was presented at the 2018 Leadership Institute.

Strategic Planning

Your chapter should have a strategic plan. The plan should be multi-year, and, if one already exists, it should be reviewed by the entire board early in the year. In the absence of a plan, the board should develop one together.

As a minimum, the plan should consider:

- Growth strategy and targets
- Overall financial picture and forecast
- Chapter goals (long term and short term)
- Marketing and communications plans
- Interrelationships and synergies available among chapter/board portfolios; and with other chapters

The strategic plan should not be a massive project in itself; keep it simple and direct. It is a plan, and if it is too unwieldy, it won't be consulted or really considered routinely in chapter operations. The mainspring of the plan answers the questions: *What do we, as a board, want to accomplish this year, or in the coming five years?* Please seek support from CWR as required. Sometimes, seasoned outsiders can offer valuable insight into this process.

Growth Strategy and Targets

- Study other chapters' strategic plans. Draft the plan and circulate it to the entire board. Consider also circulating to past presidents and other IABC chapter leaders who have moved on. They may be a good source of feedback.
- Chapter alignment to IABC's vision, purpose and three-year strategy.
- What are your short and long-term plans to strengthen and grow your chapter?



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Overall Financial Picture and Financial Forecast

- What measurements has the chapter put into place to gauge success?
- Include budget assumptions for upcoming programs, events, memberships, and sponsorships to help evaluate the financial picture of the chapter over the next year or more.
- Stay realistic and even conservative in your estimates.

Chapter Goals (long term and short term)

- These can focus on:
 - Processes
 - Technology
 - Membership
 - Finances
 - Service offering, etc.

Marketing and Communications Plans

- For regular communications with members
- For your professional development calendar
- For your social media channels, etc.
- For certification
- For your local awards program

Interrelationships and Synergies Available Among Chapter/Board Portfolios

- With another chapter located close-by
- With CWR
- To attract important sponsorships, etc.

Consider publicizing elements of the plan to all members on the website. Communicating about the plan is an opportunity to remind members and non-members what IABC is about. Review the [Chapter Management Awards \(CMA\) Manual](#); it is a good source of what you are trying to do with your plan. The goal is to create conditions within which chapters thrive.

Strategic Planning Resources

- Read the IABC [Article: Rethinking Strategic Communication for Changing Times](#) to learn more on strategic planning.

- IABC created a [Chapter Game Plan](#) to assist with the strategic planning. Download the pdf to use at the next chapter strategic planning session.
- [IABC Manitoba](#) and [IABC Calgary](#) presented their strategic plans for the 2018 Leadership Institute as a resource for other chapters.

Volunteer Management

Chapter volunteers are the heart and soul of IABC. As chapter leaders, we need to plan ahead to ensure the chapter has a well-oiled team of volunteers; who support one another as well as our members.

A key activity for the incoming president is to fill the Board of Directors roles for the next season. The goal is to have a full slate of potential board members as well as potential candidates for Vice President.

Keeping great volunteers is not always an easy task for leaders. Creating a strong board is more than luck, it takes time and effort to keep volunteers engaged, appreciated and wanting to do more for your chapter. Having a successful volunteer management program is essential to chapter success. Keep in mind that all the board members in your chapter are also volunteers.

Tips to Creating a Successful Volunteer Management Program

1. Volunteers should be given a specific role. Creating volunteer job descriptions is helpful to keep roles organized, manage deliverables, keep volunteers engaged and promote recruitment through word-of-mouth.
2. Avoid inadvertently communicating that volunteering is a “chore”. All volunteer activities should be seen and presented as ways to support the growth of member value, and of the communication professions in your area, while building leadership skills and experience.
3. Develop a range of activities that volunteers can take on; some volunteers can only offer a small amount of time; others are ready to take on larger projects. Develop a bank of jobs with needs from all levels of experience and time commitments.
4. Develop a bank of people who have indicated they want a volunteer job at the chapter level. Volunteers remain members, and often ascend to board portfolios.
5. Manage volunteers like you would an engaged employee; periodically follow up with them to see if they are satisfied or want to take on something else. Cross-portfolio movement of volunteers is healthy and can add value to your teams.
6. Deal with performance issues early; delaying a crucial conversation with a volunteer can be to the detriment of the chapter or to volunteers working in their vicinity.
7. Always keep looking for volunteers. They will cycle through so keep the bank full. Network with members at lunches and other chapter events. Publish calls for volunteers on social media and in other channels. Approach previous volunteers with new opportunities.

8. Thank volunteers. Give volunteers regular positive feedback. Acknowledge them publicly at events. Consider writing letters to the employers of volunteers who are delivering exceptional service; this shows appreciation for the volunteer and sends a message about IABC to the employer.
9. Consider a formal recognition program for your chapter. The program can add value to your existing and new volunteers. Be specific with recognition. Formal recognition could include; gift cards, volunteer events (i.e. happy hour, end of year event, etc.) or written recognition (i.e. thank you cards, profile on website/newsletters, etc.).

Volunteer Recruitment and Retention Resources

- Read the article “[The 27 Best Practices of High Performing Volunteer Organizations](#)”.
- Watch the Ted Talk on “[Micro-Volunteering – Giving Back for Busy People](#)”. Not all volunteer positions need to be long-term or complicated.
- [IABC Toronto](#) has a strong volunteer presence on their website, outlining available positions as well as describing each portfolio for volunteers to gain a bit more understanding of the programs and key roles offered. They also offer information into their volunteer recognition program.
- IABC Ottawa won a Chapter Management Award of Excellence in 2019 [for Volunteer Engagement and Leadership Development](#). Within their submission, the section on engagement discusses the value of their recognition and engagement program for volunteers.
- IABC Malaysia’s [CMA Leadership Development](#) award application for more details on their recruitment plan.

Leader Centre and Leader Letters

The [IABC Leader Centre](#) is a source of information, updates and resources for IABC leaders. Each IABC region and chapter is given centralized login information.

Information available through the Leader Centre includes:

- An overview of IABC (IABC 101).
- Information and resources on how to run your chapter (governance, finance, board development, strategic alignment, Leader Bootcamp content that offers best practices in chapter management, and more).
- Information on the Chapter Management Awards ([see CMA section for more details](#)).
- Key upcoming dates (i.e. conferences, Leadership Institute, deadlines).
- Calendar of events.
- Leader Forum – quarterly.
- Certification information.
- Chapter Spotlight (best practices from IABC Chapters).
- Corporate membership program information.
- Information on how to connect with IABC leaders around the world.
- Leaderboards and statistics on current membership drives.

In conjunction with the Leader Centre, the monthly newsletter for IABC leaders provides updates on international programs, campaigns (i.e. member month), reminders and other important news from international. Content typically includes:

- HQ communication calendar
- Upcoming events
- Important deadlines
- Links to new or featured resources
- Links to toolkits for leaders to use to activate campaigns within their chapters (e.g. member month promotion, mentorship, certification)

The Leader Letter is distributed on the last Tuesday of each month and past editions of the Leader Letter are archived on the Leader Centre.

Note: Do not unsubscribe from IABC emails as you will unsubscribe from the Leader Letter as well. If you have (before joining the board), simply visit IABC.com and re-subscribe to IABC emails.



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Local Contact and Passwords

Each chapter has their own contact lists and email addresses for members to access the chapter board. This section can be repurposed as your chapter's contact sheet and password list.

Board Email Addresses

President: President@localchapter.com

Additional Email Addresses

Administration Passwords

Box.com or Google Drive user name & login:

Web Passwords

Website user name & login:
Website admin login:
Additional notes for website:
Mailchimp user name & login:

Survey Monkey:

The CWR Board has purchased a Survey Monkey Gold Plan that can be used by chapters as well.

www.surveymonkey.com

Username/Password: Request from the CWR Board Secretary at cwr-admin@iabc.com

In 2014, the Board engaged Research Works to review all of the Chapter member surveys and provide a “best practice” version of a consolidated survey that Chapters are free to copy, use and customize as they see fit. The survey templates are located in the Survey Monkey folder: *Chapter member survey template CWR*.

Social Media Passwords

LinkedIn user name & login:
LinkedIn Group user name & login:
Twitter user name & login:
Instagram user name & login:
Facebook user name & login:
YouTube user name & login:

Finance Passwords

Event Management Passwords

Eventbrite user name & login:

Chapter Membership

Corporate Memberships

In 2018, IABC launched a new corporate membership program. The program was designed to add significant value to corporate members. A full marketing toolkit was created to provide the tools and resources for your chapter needs in assisting current corporate members to understand the new corporate membership structure and recruit new corporate members.

The IABC Corporate Membership packages provide organizations (more than 19 members) with a fully integrated solution for professional education, peer-to-peer knowledge sharing, and best practice resources for their entire communication team. Features of the new corporate membership packages include:

- Unlimited access for corporate members to all courses through the IABC Academy
- An educational pathway to professional certification through the Global Communication Certification Council (GCCC)
- Complimentary Gold Quill Awards entries
- Global Communication Certification Council (GCCC) certification exam application fee waivers and more

IABC Corporate Membership Toolkit Resources

Through the Leader Centre, you can access the [IABC Corporate Membership Toolkit](#) resources. Some of the resources included are:

- A video was created for businesses to understand what IABC is and how a membership is beneficial to their organization: [IABC Corporate Membership Video](#)
- Social Media Graphics
- [Key Messaging](#)
- [Infographic](#)
- [One-page Marketing Flyer](#)
- [Renewal Invoice Template](#)

Chapter Finances

As a not-for-profit organization, IABC must manage its finances wisely, which makes the role of Treasurer a key one on a chapter board. This role involves a wide range of activities throughout the chapter year including:

- Handling the chapter's financial and budgeting tasks, including payment of the chapter's bills and tracking chapter revenues;
- Working with the chapter executive to update and/or draft an annual budget
- Directing and controlling the chapter's finances, while maintaining official financial records;
- Co-ordinating an annual financial review/audit (if required by chapter bylaws) with an accountant or bookkeeping firm;
- Ensuring adherence to financial procedures and filings as required by chapter and IABC International bylaws as well as Revenue Canada/Internal Revenue Service; and
- Serving as a resource and mentor to board members and other chapter leaders in the areas of budgeting and chapter finances.

The success of a chapter can rely heavily on its ability to develop and adhere to a budget that supports its strategic plan.

Budget Management

An important tool for both the entire chapter management team as well as each portfolio director/VP is the chapter budget. Typically, the chapter budget is created annually – based in part on the previous year's performance as well as the strategic plans put forth by each chapter portfolio – to create a document that should be used to guide the thinking and decision-making of the board as the year unfolds.

A solid budgeting process ensures financial responsibility is maintained, helps provide stable cash management and serves as a guideline or measuring stick to measure progress made throughout the course of the chapter year.

Once passed by the chapter board, the budget should guide the spending of the chapter board and its members. Each month, as revenues flow in and expenses come due, these items need to be recorded and tracked in a proper bookkeeping system (Simply Accounting or Quick Books). Investing in this now reduces administrative headaches later.

Budget Management Resources

There are a number of excellent budget management tools available, both within the IABC world and in the general world of corporate or organizational finance. These include resources such as:

- [Chapter and Regional Finance Guide](#)
- Article - [A Guide to Non-profit Budgeting](#)
- Article - [Budgeting: A 10-Step Checklist](#)

Fiscal Reporting

Even as a not-for-profit organization, operating within Canada requires that an IABC chapter file a number of forms with the Canada Revenue Agency (CRA) annually. Failure to do so can result in everything from fees and penalties to the CRA withholding money due back to the chapter (GST rebates for example).

Some of the forms that are required to be completed and submitted each year include:

- T2 Corporation Income Tax Return – T2
- Non-Profit Organization (NPO) Information Return – T1044

And in cases where the chapter files these electronically, the CRA also typically requires completion of:

- Information Return for Corporations Filing Electronically – T183

Reporting to IABC International

All IABC chapters are also required to complete and submit several forms to IABC International annually. A reminder and notification of the need for these forms is typically sent out from IABC International in early January, with a completion deadline of mid- to late-February.

This is designed to let IABC International to provide the U.S. Internal Revenue Service with a full accounting of the association's activities. For Canadian chapters, these two forms are:

- CWR Non-US consent form (updated annually); and
- International Financial Statement Year-end Template.

Reporting to Chapter Board and Membership

The Treasurer should be preparing and distributing an updated set of interim financial documents each month to ensure the chapter board is tracking and aware of financial performance throughout the year. Once per year, the Treasurer is responsible for presenting the approved/audited financial statements of the chapter at the chapter's Annual General Meeting (AGM).

At this AGM, the Treasurer is required to put forth a motion proposing that the membership accept the financial statements as presented and must be prepared to respond to any comments or questions

they receive from members. This reporting back to members is a vital aspect of financial transparency for members, whose money the chapter is managing.

Treasurer Duties

While not every chapter follows a July 1-June 30 fiscal year, the majority in the Canada Western Region do. For a chapter that follows this schedule, some common finance activities and typical treasurer duties during the chapter year would be:

- | | |
|------------------------------|---|
| August/
September | <p>Budgeting - Starting the Year</p> <ul style="list-style-type: none"> • Early August – should be when the books are closed off for the June 30 year end and you should have actuals for the previous fiscal year. • End of August - Send budget planning document to all portfolio directors, asking them to provide budget proposals based on their planned activities for the coming year. • Early Sept – budgets are due and submitted for review by the chapter executive. This review is typically led by the Treasurer who should be able to explain the origin of each number in the proposed budget document. • September board meeting – Once the chapter executive has reviewed and approved the budget in principle, they should meet and review the budget with the entire board. The Treasurer would typically prepare a motion to discuss the budget, followed by discussion and questions from the board members. If the motion is passed, the budget is approved for the year. |
| Nov/Dec | <p>Financial Review</p> <ul style="list-style-type: none"> • Many chapters will conduct a financial review or audit every year. This process typically starts in November or December, with the goal of completing by mid-December of the year. • This is also the time when the chapter is required to complete and submit the required CRA forms (deadline of Dec. 31) |
| January | <p>Year-end Report for IABC International (due in February)</p> <ul style="list-style-type: none"> • All chapters are required to fill in reports to International. • Typically, the chapter board should be reviewing their budgets monthly. With January marking the halfway point of most chapter years, this is an excellent time to conduct a full budget review. |
| June | <p>Fiscal Year Closure</p> <ul style="list-style-type: none"> • Ensure as many of the expenses incurred in the current fiscal year are submitted for payment and any other pending expenses or income is carefully recorded |
| July - Sept | <p>Prepare Signatory Changes and Submit GST Return</p> <ul style="list-style-type: none"> • As board members leave/join the chapter board, you may be required to submit signatory changes to the bank to update the people authorized to conduct financial transactions on behalf of the chapter. |

Chapter Professional Development and Sponsorship

Sponsorships

Creating value for members can be challenging. Whether event hosting or hosting a website, chapters have limited funds and are left looking for sponsorships to help offset costs.

Sponsorship is more than asking for money. It is establishing a relationship with an organization and showing how their contributions will be of benefit, not only to your chapter and the event, but to the sponsor as well. This is becoming increasingly important as corporate budgets tighten and fewer sponsorship dollars are available.

Chapters should consider the following when seeking sponsorships:

- Who you are: demographics about your chapter and your membership
- What you do: your purpose as an IABC chapter and how you serve the needs of your membership
- Where to find you: outline your web and social presence
- Why partner with you: what is the benefit to the organization for sponsoring? Bonus points if you can align with the organization's business goals and objectives
- When to partner: identify a variety of options including annual sponsorships or event-specific opportunities
- How to partner: what options are available including cash or in-kind sponsorships

Chapter Sponsorship Resources

- At the 2018 Leadership Institute, [IABC Minnesota](#) hosted a session on sponsorship and the success they have enjoyed in their program. Check out their [sponsorship flyer](#), which includes most of the considerations noted above. Their sponsorship packages also include discounts for organizations that have IABC corporate memberships.
- IABC BC has set up their website with easy access to sponsorship packages. Take a look at [their website](#) for ways to increase your sponsorship package(s) or download the [sponsor marketing package](#) pdf.
- IABC Africa Region created a presentation on [Strategic Sponsoring Packages](#) (Daniel Munslow, 2016) which outlines an example of how to strategically plan and source out corporate sponsors.
- [IABC International – Leader Centre](#) has some information on sponsorship as well as examples from IABC Minnesota with [agreements](#) and [opportunities](#).
- IABC Wellington won a Chapter Management Award of Excellence for Sponsorships and Partnerships in 2019; check out their [chapter award work plan](#) for another example of best practices.

Event Management & Professional Development

Chapter events and professional development planning are essential to building a successful chapter. IABC London experienced a 230% increase in attendance at chapter events over the last couple of years. They shared some tools and resources to support other chapters in planning successful programs in the IABC Leader Centre. [Click here to see their presentation, communication plan and more.](#)

Top Ten Considerations for Planning Events in Your Chapter

1. Analyze member data. Who are your members? Are they new to the industry? Experienced communicators? What are the kinds of events will they be attracted to? What are their PD needs?
2. Talk to your members. Survey them. Ask them at the end of events what they thought. Ask them what could be improved. Talk to trusted colleagues. Board members should do this all the time. That is a source of important business intelligence for planning.
3. Consider sponsorships. A sponsorship program is a good thing for a chapter to have and events provide a venue/platform for visibility. Sponsorships can help with costs and could elevate the chapter's brand resonance.
4. Ensure that the events provide value for members. Events should be worthwhile from a financial- and time-investment perspective.
5. Some members value networking more than PD events. Try to add a few events which mix up the PD with separate networking (i.e.: pub night or TGIF drinks) or special interest groups to your chapter mix of programs. Remember this is a unique selling point you have, when they compare with free online PD offering. You are offering unparalleled networking.
6. Price events strategically. Consider offering members a lower rate. The goal of offering different rates (to members, non-members, retirees, students, as a package of several events...) is to demonstrate value for members without harming marketing efforts to all communications professionals.
7. Develop a plan for the year to achieve balance and consider seasonal offerings ahead of time. Allow for wiggle room so that you can be ready to take advantage of timely opportunities.
8. Use events to offer "join and go options". Events are a great initial handshake with a potential member. These opportunities should be maximized and never, ever wasted.
9. Keep track of who is attending your events. Cross this information with chapter data. Develop a good sense of who is coming. Reach out to the demographic (or individuals) who are not. Develop events tailored to these groups. Probe: is it that the educational offerings are off, or are aimed at too junior or too senior an audience?
10. Consider partnering with CWR on regional events. They can be a significant source of value to members from a PD perspective and can boost chapter finances and membership.



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Chapter Event & PD Resources

- IABC Manitoba showcases current and previous event listings for quick and easy access on their website. The main pages show a quick glance into the event, while the link offers more details and quick access for members to register. [Click here to visit IABC Manitoba events page.](#)
- IABC Kansas City won a [CMA of Excellence for Chapter Events for 2019](#). Take a look at their submission for details on the successful planning of their one-day Business Communicators Summit event.
- IABC Ottawa won a CMA of Merit for Chapter Events in 2019. Their submission showcases volunteer management for events as well as challenges and successes of their event programs. Take a look at their [submission report for the 2019 CMA](#).
- [IABC offers a list of speakers from the World Conference](#), for chapters and regions looking for speakers.

International & Local Award Programs

IABC Gold Quill Awards

For decades, IABC's Gold Quill Awards have recognized excellence in strategic communication worldwide. Gold Quill is the only awards program that honors the dedication, innovation and passion of communicators on a global scale.

Recognizing member accomplishments is one of the best ways to add value to an IABC membership and is a great way to engage members of your chapter. Each year, International provides a toolkit for chapter leaders to support the promotion of the Gold Quill Awards program. The toolkit can be found in the Resources section of Leader Centre and includes sample tweets, case studies and more. Encourage your chapter members to have their work recognized and increase their engagement with IABC. The Awards are also available to non-members; consider reaching out to these winners as well, as a soft introduction to the local chapter.

[Gold Quill Promotional Toolkit](#) – Find information and promotional connect to assist your chapter with marketing of the Gold Quill Awards program as well as key application dates. The webpage offers templates for press releases, social media posts, case studies and Gold Quill logos.

IABC Awards and Special Designations

Fellow Designation

The [IABC Fellow designation](#) is the highest honor we bestow on our members. Becoming a Fellow denotes a body of achievement by a communicator who has had a significant impact not only on his or her organization and IABC but also on the communication profession at large.

The designation is considered a professional lifetime achievement award. It is given to recognize IABC members who have continually made an outstanding contribution to the communication profession, through exemplary achievement within their own organization and through unselfish service to IABC and its members.

Only 98 of the world's top leaders (2020) have earned this superlative designation. It is considered by IABC to be a career achievement award for the industry.

The criteria for Fellow nominations:

- Contribution to the communication profession
- Career achievement
- Authorship, speaking and lecturing
- Contributions to the community

Rae Hamlin Award

Rae Hamlin, ABC, was instrumental in the development and success of IABC's long-standing accreditation program – a mark of excellence in strategic communication management for over 40 years. In her 25 years with IABC, Hamlin managed and inspired volunteers worldwide to promote this standard, including a stint as an accreditation co-ordinator on staff at IABC headquarters. She passed away in 2009.

This award is bestowed at the IABC World Conference annually in her honor, continuing to recognize exemplary service in advocating the new Global Standard of the Communications Profession.

Selection Criteria

A recipient is chosen based on:

- Commitment to advocating the principles of the Global Standard of the Communications Profession in practice, locally and globally.
- Impact at the grass-roots level for driving engagement in the GCCC certification program in their chapter, region or workplace.
- Service in a leadership position toward advancing IABC's mission to share best global communication practices, ideas, and experiences that will enable the development of highly ethical and effective performance standards for our profession.

View previous recipients of the Rae Hamlin Award on the [IABC website](#).

Chair's Award

The Chair's Award is conferred annually upon volunteer IABC members whose efforts, which include positively enhancing the organization's reputation and image, have gone above and beyond that of what volunteers may usually undertake. Selected by the international executive board (IEB) Chair, any current IABC member active for the previous five years may be nominated for the award.

The Chair's Award is presented annually at IABC's World Conference. View previous recipients of the Chair's Award on the [IABC website](#).

IABC Master Communicator

The IABC Canada Master Communicator designation (MC) is a lifetime achievement award for Canadian IABC members who are Accredited (ABC) or Strategic Communication Management Professional (SCMP) designees. The designation recognizes outstanding Canadian communication professionals whose work has brought credit to IABC, the profession, their organization or clients, and whose contributions have raised the standards of organizational communication in Canada. Find out more details about [the national program and nomination process](#).

Master Communicators are recognized for their outstanding contributions to IABC, the profession, their organization or clients, and whose contributions have raised the standards of organizational communication in Canada. Only 67 (2020) communication professionals have received the Master Communicator designation since the inaugural ceremony in 1980.

Who Can Qualify

- Members of IABC Canada East or West in good standing
- Nominees must reside in Canada
- It is preferred, not mandatory, that the nominee has been a member of IABC for at least five years
- Members serving on boards, committees, or task forces at the local, national or international level are eligible for nomination

Who Can Nominate

- All active IABC Canada East or West members, chapters and the regional boards
- Self-nomination is not allowed
- Members of the MC Committee may not nominate a candidate during their term

Nomination Requirements

- A completed application form
- A personal letter of recommendation that speaks to how the nominee demonstrates the IABC shared values and brand personality
- Letters of recommendation from four sponsors that support the nomination; one for each of the following:
 - Contribution to, and leadership in, organizational communication
 - Career achievement
 - Authorship, speaking and lecturing
 - Contributions to IABC

In 2019, the MC Committee introduced a more transparent, objective, and simplified process based on a seven-point scale. Download the [MC Nomination package](#) for more details on the process and what to include in the nomination package.

Canadian chapters and IABC Canada East or West members are encouraged to nominate outstanding communication professionals for this designation.

Silver Leaf Awards

The Canada East and West regions of IABC recognize the talented, professional communicators working across the country to influence best practices in the field of communications and public relations.

The IABC Silver Leaf Awards reward strategic thinking and creative execution for excellence in communication, advertising, marketing, photography and graphic design in Canada. There are four divisions with 34 categories to choose when applying for the award. The divisions are:

- Communication Research Management
- Communication Management
- Communication Skills
- Communication Training and Education

Communication Research Management

Entries in this division recognize the importance of research and measurement as a foundation for all strategic communication work, and that this competency is integral to success throughout the career path of a communication professional.

Communication Management

This division focuses on strategic communication planning and execution of internal and external programs and includes entries that combine communication disciplines for internal and external audiences.

Communication Skills

The Communication Skills division includes marketing and communication elements that showcase technical skills such as editing, writing, design and multi-media production. Entries in this division are generally tactical in nature. Entrants must demonstrate strategic alignment, the creative process and measurable results.

Communication Training and Education

This division recognizes the mentorship and education role of consultants and senior communicators in developing and delivering workshops, classes, seminars or training that educates an audience about any aspect of the communication profession. This division includes all communication disciplines and professional competencies.

Silver Leaf Award Information and Recourses

Awards Cycle - The Silver Leaf Awards cycle runs from April to December, with the call for entries typically launching in May and the winning entrants notified in September. The timing is intended to align with the Gold Quill call for entries (September) so entrants can improve their entries based on the feedback from the Silver Leaf judges to enter the IABC International awards program. Timing is also important to line up with the Canada West conference, held in the fall of every second year.

[Website and Applications](#) – Visit the website to find detailed information on the call for entries, previous award winners, category details, important dates and eligibility, and evaluation criteria.

Recognition of Winners – Award-winning entries will be notified by the end of October each award cycle. Recognition is also acknowledged in the biennial Canada West Conference for all winning entries across Canada. Chapter recognition is encouraged and should be part of the chapter level marketing and communication plans.

Local Chapter Awards

Some chapters offer local award programs for their members to honour the outstanding communications work of individuals and/or teams within the local chapter area. If you are interested in starting an award for your chapter, reach out to one of these chapters for best practices or speak with your CWR board buddy to discuss options and support.

IABC/BC - Wave Awards

The [Wave Awards program](#) recognizes and celebrates professional communicators for their contributions to organizations, to the community, to our chapter and the profession.

The Wave Awards are IABC/BC's signature awards program, designed to recognize the people behind the great work in our chapter. Each year, the awards recognize communicators who have demonstrated excellence either in their day-to-day work, in their contributions to the chapter, in support of a community cause, or as part of a formal learning program. The Wave Awards also recognize achievements at different stages in a communicator's career.

Eligibility for the Wave Awards

- Nominees must be current IABC/BC members (non-board members) at the time of nomination and at the awards event.
- Exceptions: Student Advancing in Learning (SAIL) award nominees do not need to be IABC/BC members, but they must be currently enrolled in a communications, marketing or public relations post-secondary educational program in British Columbia.

Award Categories

- The Making Waves Award
- The Lighthouse Award
- The Ripple Effect Award
- SAIL Award (Student Advancing in Learning)
- New Navigator Award
- Long Beach Award



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IABC/Edmonton Capital Awards

The IABC Edmonton Capital Awards have occurred for over 25 years. IABC Edmonton follows the same categories and criteria as IABC Silver Leaf and Gold Quill awards programs.

[IABC Edmonton's Capital Awards](#) program uses a customized judging system. This system has provided significant efficiencies and allows for judges across the country to participate and easily get support. In this program, judges are not assigned to judge with another judge – they judge independently, and scores are averaged. IABC Edmonton is proud to have over 40 judges from across Canada participate in the judging process which, due to Edmonton's tight-knit communications community, prevents bias and the system has received substantial support through feedback and recognition by other Canadian chapters.

The awards program involves a spirited gala that sees over a hundred communicators (sometimes over 200) come together to celebrate the achievements of communicators in Edmonton. This event is their signature event of the year and happens at the end of the board year (end of May).