


STRONGER TOGETHER TASKFORCE 2.0

IABC Leader Town Hall & Update

7 & 8 May 2024



International Association
of Business Communicators



WELCOME & INTRODUCTION

Alain Legault, SCMP®
Past Chair, IABC,

Chair, Stronger Together Organizational Design
Taskforce 2.0



International Association
of Business Communicators

- Investing in our future
Current governance structure is more than 50 years old
- Setting ourselves up for membership growth
- Ensuring we are financially sustainable
- Reducing the administrative burden on our volunteer leaders

1

Designed for today

Our structure must be appropriate for the size and scale of IABC today

2

Designed for growth

Our structure must support membership and revenue growth

3

Designed for speed

Our structure must enable us to become a more agile organization that can react quickly to market trends and opportunities

4

Designed to enhance the member experience

Our structure must be designed with the member experience at its core

Purpose: Develop specific implementation recommendations in the areas of governance, finance and change management to deliver on the agreed operating model.



Governance Committee



Finance Committee



Change Communication Committee

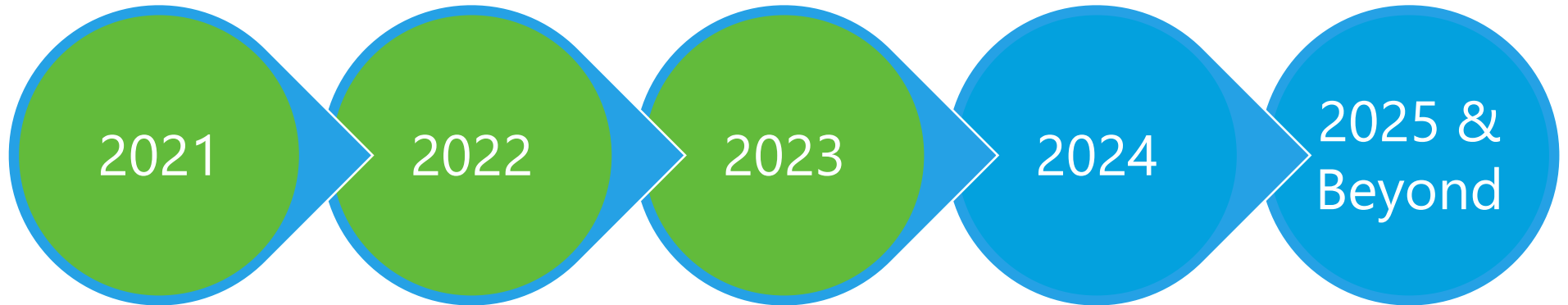
**STRONGER
TOGETHER**

#IABC2025 Strategic Plan

Stronger Together Strategic Plan introduced that emphasizes the collective power of one seamless global organization.

Bylaws ratified & Taskforce 2.0

The organization voted on the Taskforce 1.0 recommendations and ratified bylaw changes. Taskforce 2.0 was established to continue the work.



Taskforce 1.0

International Executive Board (IEB) established Taskforce 1.0 to help the executive leaders and staff consider how we can best organize ourselves structurally and operationally to thrive in the future and deliver on that strategy.

Bylaw changes

- Region immediate past chairs will serve a 1-year term on the IEB & region vice chairs will be selected through an open call process by the IEB Nominating Committee.
- International Finance Committee composition to include IABC chair & vice chair and region treasurers/ directors of finance.

Socialization

Taskforce 2.0 is now working to socialize their recommendations with leaders and members. Implementation work will continue through staff and International committees.



G**VERNANCE UPDATE**

Wendy Thatcher, SCMP®

Stronger Together Organizational Design
Taskforce 2.0 Member

Vice Chair, IABC Canada West



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- Develop specific recommendations for future governance of IABC
- Inform changes to the bylaws and corresponding policies and procedures, including reviewing governance between regions and chapters, and the current voting model* used for association matters

**Voting model deferred*

THE PROPOSED MODEL



Member-centered & designed to delegate more strategic decision-making & financial control to the regions, closer to their communities.

Members could belong to at least one, but potentially multiple communities, with much more flexibility around the definition of a community, to allow groups of like-minded members in a common geographic or subject-matter area to form as appropriate, without the constraints of budget and administrative management.

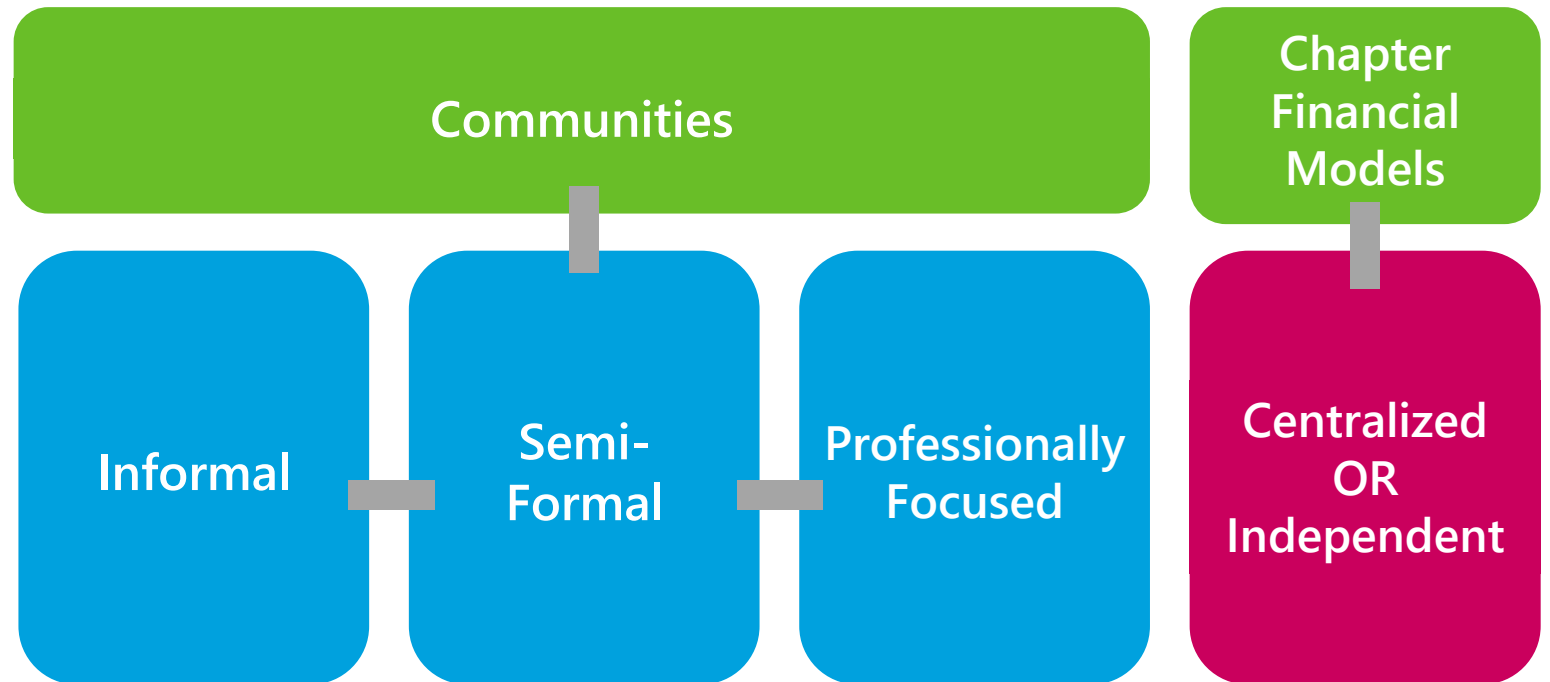
That could be done through a formal chapter as currently, but also as a networking group, a special interest group or through volunteering opportunities at the regional level.

The goal is to get members plugged in with others as soon as possible.



Communities

- Less formal structure than those that govern the Global Center, regions & chapters
- Communities *must* be sponsored by the Global Center, region or chapter & aligned to strategy & brand



Structure: Informal

Examples:

- Comms to the Table
- Senior Forum

- Informal communities where IABC members from a specific location connect with shared social interests, virtual or in-person events, as and when needed
- Chapter or region sponsor
- Non-governing group
- Has **one** official liaison with sponsoring IABC entity
- Doesn't have IABC international voting rights



Structure: Semi-Formal

Example:

West Africa Community



- Semi-formal entity that connects IABC members in a specific location (e.g., West Africa, through regular virtual and in-person events)
- If required, the chapter or region sponsor collects revenue and signs contracts
- A non-governing group
- May merit a representative on the sponsoring chapter or region board
- Has a Memorandum of Understanding (MOU) with the sponsoring chapter or region board
- Might ultimately become a more formalized community (e.g., chapter)
- Doesn't have IABC international voting rights

COMMUNITIES IN ACTION



Structure:
Professionally Focused Interest Group

Example:
Consultants Interest Group

- Connect IABC members with special or shared interests (e.g., consulting, change management, DE&I, meet bi-monthly)
- Currently Global Center sponsors a group of international SIGs (many chapters and regions also have SIGs)
- Non-governing group
- Has **one** official liaison with IABC sponsoring entity
- Doesn't have IABC international voting rights



COMMUNITIES IN ACTION



Structure:
Chapter

Example:

- IABC Toronto
- IABC Philippines



- Connect IABC members in specific geographic areas regularly through various events and offerings
- Chapters can be part of the centralized financial model through the Global Center or have independent finances
- Governing group with bylaws and board of directors with at least **five** leaders
- If part of the centralized financial model, has a Memorandum of Understanding (MOU) with IABC
- Has independent finances and bylaws
- Could have an independent policy manual
- Has IABC international voting rights

REGIONS



- Connect IABC members, chapters and communities in specific geographic areas for various events and offerings
- Provides oversight to chapters and communities in the region
- Collects revenue and signs contracts
- Governing group with a board of directors
- Has bylaws and could have independent policy manual
- Has IABC international voting rights





- Responsible for strategy and governance under the direction of the International Executive Board (IEB) and with the support of an association management firm SmithBucklin
- Supports members with innovative thinking, shared best practices, in-depth learning and career guidance
- Financial management of the association
- Drive brand awareness and marketing campaigns, oversee IABC platforms and structure
- Lead content marketing and thought leadership strategy
- Formal governing entity with International Executive Board
- Has bylaws and policy manual
- Provides administrative support to communities, chapters and regions
- Has voting rights through the International Executive Board

REGIONAL VICE CHAIR NOMINATIONS



- Regional vice chairs for 2024-2025 board year now selected by the IEB Nominating Committee through the open call process
- Regions need to update their bylaws to reflect this change
- Regional vice chairs commit to a three-year progression:
 - **Year 1:** Regional vice chair and member of the International Membership Committee
 - **Year 2:** Regional chair and member of the International Executive Board Nominating Committee
 - **Year 3:** Regional past chair, director on the International Executive Board and member of the International Committee Nominations Committee

- IABC has been working with legal counsel on documents needed to support new governance and financial structure
- Updates regarding anticipated changes include:
 - **International Bylaws changes:** Not anticipated
 - **International policy and procedure updates:** Anticipated
 - **New affiliate agreements:** Anticipated
 - **New MOU for Communities, Regions & Chapter with Global Center:** Anticipated

FINANCE UPDATE

Ann-Marie Blake, Chart.PR, FCIPR
Treasurer & Secretary + Stronger Together
Organizational Design Taskforce 2.0 Member

Brad Whitworth, ABC, SCMP® , IABC Fellow
Stronger Together Organizational Design
Taskforce 2.0 Member



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- Develop the next steps for a networked financial model
- Develop a model that complements and works in tandem with the governance changes.
- Conduct financial review to determine the overlap
- Working with regions and chapters to co-create a viable finance operating model that is fit for purpose

CURRENT FINANCIAL STRUCTURE



GLOBAL CENTER

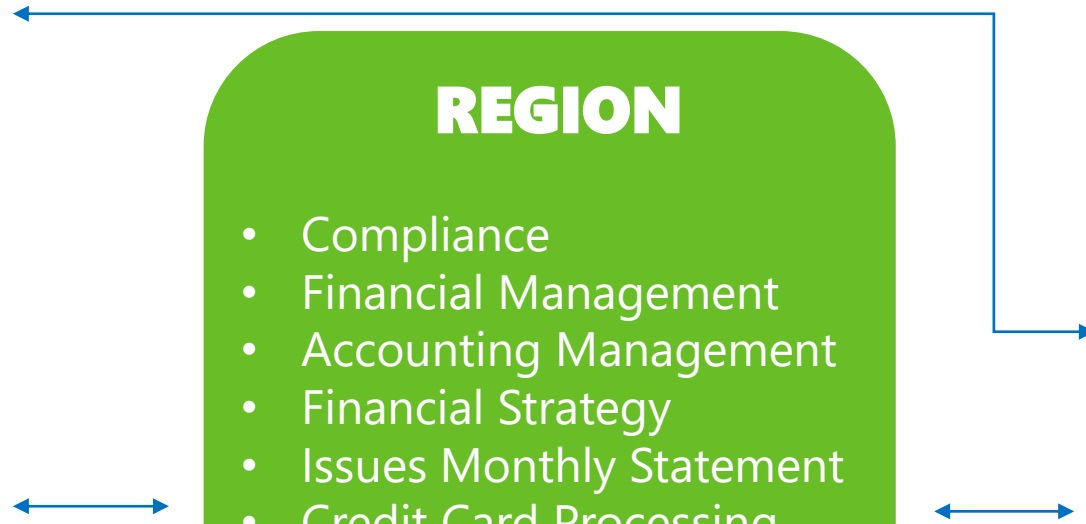
- Compliance
- Financial Management
- Accounting Management
- Financial Strategy
- Issues Monthly Statement
- Credit Card Processing
- Accounts Payable
- Accounts Receivable
- Membership Dues
- Forecasting
- Budgeting
- Investment Management

REGION

- Compliance
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CHAPTER

- Compliance
- Financial Management
- Accounting Management
- Financial Strategy
- Issues Monthly Statement
- Credit Card Processing
- Accounts Payable
- Accounts Receivable
- Membership Chapter Dues
- Forecasting
- Budgeting
- Investment Management



Challenges

- Same tasks being done at all levels (redundant)
 - Inconsistency and quality of the management of tasks vary greatly
- This drives an inconsistent and varying member experience
- Challenges finding a treasurer due to complexity of role
- Creates compliance issues
 - Bank account access issues
 - “Misplaced” funds
 - Governing law compliance concerns
 - Tax issues
- Inefficient use of organizational resources (for staff and volunteers)
- Investments
- Global businesses need consistency in management and accounting practices to thrive and to ensure compliance

- After reviewing and incorporating feedback, the direction of travel for the financial and business operations of regions, chapters, communities is to begin the process of centralizing business operations of regions, chapters, communities within the Global Center.
- There are some countries where centrally managing the business is not practical.
 - In this case, IABC will work with professionals and the local volunteer leaders to determine how IABC can best serve and support the local community and manage compliance requirements.

PROPOSED STRUCTURE

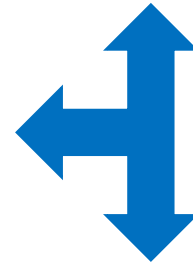


GLOBAL CENTER

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REGION

- Financial Strategy
- Forecasting
- Budgeting
- Investment Management
- Sharing Vendor Invoices
- Supporting Community Budgeting
- Local Programmatic Payments

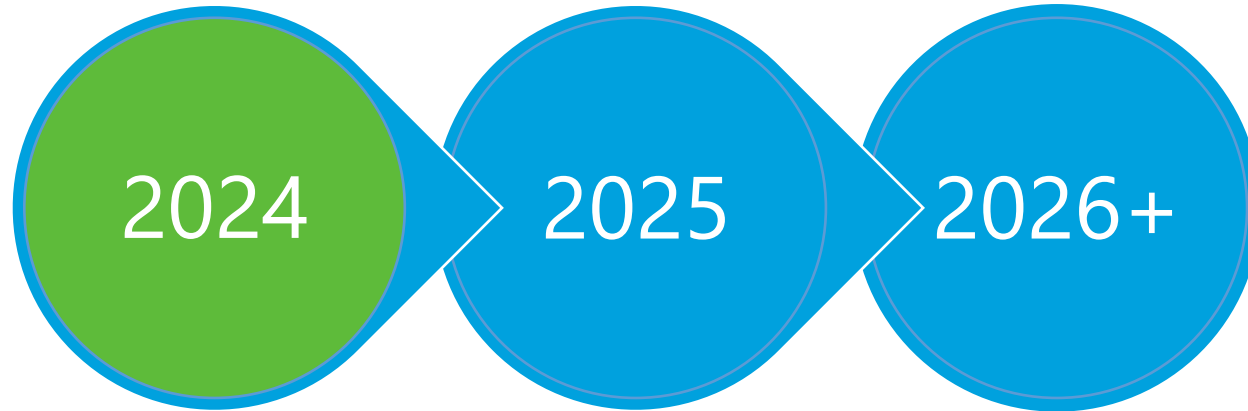


CHAPTER/COMMUNITY

- Financial Strategy
- Forecasting with the Region
- Budgeting with the Region
- Sharing Vendor Invoices
- Local Programmatic Payments

- **Requires one EIN and bank account to develop master level service agreements:**
 - Concur – Invoice and reimbursement processing (no cost)
 - Emburse – Digital Master Card debit cards for small, local or electronic payments (no cost)
 - Event Brite – Event management (no cost)
 - HubSpot – Communication management (no cost)
 - Zoom – Virtual meetings and events (maybe at slight cost, but comes with advanced tools)
 - Epicor – Accounting tool (no cost)
 - Open Water – Award submissions, abstract and application management
- **Potential future additions to the stack:**
 - Web hosting (details to be determined at a future date)
 - Templated microsites (details to be determined at a future date)

TRANSITION OUTLINE



**COMPLETE U.S.
TRANSITION TO
COMMUNITIES**

**CANADA, EMENA, AFRICA, APAC
MANAGED TRANSITIONS**

Globally, chapters that want to transition to community model are given path to do so

IABC works with local leaders, legal counsel & financial counsel to plan & implement transition





QUESTIONS & ANSWERS

Gabrielle Loring

Stronger Together Organizational Design
Taskforce 2.0 Member



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CLOSING REMARKS & NEXT STEPS

Jordan Nagel, MBA

Stronger Together Organizational Design
Taskforce 2.0 Member

Immediate Past Chair, IABC Southern Region



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THANK YOU TASK FORCE 2.0



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- Amanda LeNeve, SCMP®
- Andrew Kaszowski, CMP®
- Ann-Marie Blake, Chart.PR, FCIPR
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- Paige Schafer
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- Tammy Nienaber, SCMP®
- Valerie Chelangat, MFA, BA, BBA
- Wendy Thatcher, SCMP®

- Virtual Town Hall for IABC members (mid-June)
- "Ask Anything" booth at World Conference in Chicago
- Updates in Leader Letters and Leader Centre
- Continued engagement

TAKE SURVEY



THANK YOU!



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