

**IABC Heritage Region  
2008-2009 Action Plan Final  
October 12, 2008**

<b>1.0 LEARNING and GROWTH</b>		
<b>Critical Success Factor</b>	<b>Actions</b>	<b>Portfolios</b>
	<b>The Heritage Region will integrate IABC's brand promise and brand identity into all actions, events and materials associated with Learning and Growth.</b>	<b>Brand Champion serves as facilitator/resource</b>
<p><b>1.1</b></p> <p><b>IABC has effective and engaged volunteers who are aware of and understand the strategic direction of the association</b></p> <p>Measures should focus on:</p> <ol style="list-style-type: none"> <li>1. <b>Values</b> – Are regions recruiting volunteers to meet chapter and member needs?</li> <li>2. <b>Capacity</b> – Are we providing the right resources to help our volunteers succeed?</li> <li>3. <b>Foresight</b> – Are we providing leaders with relevant tools and information?</li> </ol>	<p>Liaisons develop an action plan for how best to provide guidance to chapters assigned to them in the coming year. This should include:</p> <ul style="list-style-type: none"> <li>• Assign liaisons to chapters each summer and review expectations including: initial direct contact with each new chapter president at the beginning of each new board year to introduce self, see how familiar the chapter president is with HR and agree with chapter leader on frequency &amp; method of contact.</li> <li>• Target face-to-face visits for once every 2 years to each chapter, with a special focus on small, developmental and struggling chapters.</li> <li>• Evaluate posting self-assessment resources on HR web site as alternative to liaison assessment. Promote these tools through the chapter liaisons and other communication vehicles.</li> <li>• Liaisons to network with chapter leaders through conference &amp; face-to-face exchanges.</li> <li>• Develop some norms &amp; common tools to define a “healthy” HR chapter by getting better definition from HQ on what is a healthy chapter and what are expectations for new member renewals/retention for our region.</li> <li>• Share chapter needs with Leadership Development to ensure appropriate content can be included in Leadership Forum.</li> <li>• Share information about chapter growth or decline with Region Growth &amp; Development so they can better address the needs of the region.</li> </ul>	<ul style="list-style-type: none"> <li>• Chapter Relations Director with full liaison team</li> <li>• Leadership Development (Training Chair)</li> </ul>
	Highlight leadership successes. (See Business Processes – Communication)	<ul style="list-style-type: none"> <li>• Communications</li> <li>• Leadership Development (Recognition Chair)</li> </ul>

**IABC Heritage Region  
2008-2009 Action Plan Final  
October 12, 2008**

<p>Conduct Leadership Forum for chapter leaders and regional leaders at a pre-conference session during the HR annual conference in October.</p> <ul style="list-style-type: none"> <li>• Before, during and after forum, assess needs of chapter leaders.</li> <li>• Recruit chapter leaders to help plan conference and future forums.</li> </ul>	<ul style="list-style-type: none"> <li>• Leadership Development (Training Chair)</li> </ul>
<p>Re-assess the format, frequency and content of the roundtable calls to determine what will provide the most value to chapter leaders and execute accordingly. Consider a chapter leader survey to determine preferences.</p>	<ul style="list-style-type: none"> <li>• Chapter Relations (Chapter Relations Chair)</li> </ul>
<p>Evaluate the need to update the recognition letter, developed by 2006 Recognition Chair, which suggests how chapters might recognize their leaders. Post &amp; disseminate current or updated recognition letter.</p>	<ul style="list-style-type: none"> <li>• Leadership Development (Recognition Chair)</li> <li>• Communications</li> <li>• Chapter Relations</li> </ul>
<p>Continue to send monthly Leader Letter to chapter leaders to highlight upcoming events.</p> <ul style="list-style-type: none"> <li>• Include branding news &amp; tips</li> </ul>	<ul style="list-style-type: none"> <li>• Communications</li> <li>• Portfolio Directors &amp; Chairs</li> <li>• Brand Champion</li> </ul>
<p>Provide resources for major leadership development meetings.</p> <ul style="list-style-type: none"> <li>• Vote on stipends to chapters to attend IABC's Annual Leadership Institute</li> <li>• Vote on stipends to chapters to attend Heritage Region Leaders Forum</li> <li>• Chapter liaisons identify chapters and individuals that should be encouraged to apply for regional and international financial resources to attend Leadership Development training.</li> </ul>	<ul style="list-style-type: none"> <li>• Chapter Relations</li> <li>• Leadership Development</li> <li>• Finance (Scholarship &amp; Chapter Grants Chair)</li> <li>• Board</li> </ul>
<p>Plan a more effective way of actively soliciting participation in the International Conference Scholarship Program.</p> <ul style="list-style-type: none"> <li>• Consider separate application questions and/or criteria for MALS to encourage greater participation and to better align with the region's MAL goals.</li> </ul>	<ul style="list-style-type: none"> <li>• Finance (Scholarships &amp; Chapter Grants Chair)</li> <li>• Region Growth &amp; Development (MAL Chair)</li> </ul>
<p>Actively solicit IABC conference scholarship winners to participate in region activities and in volunteer positions.</p>	<ul style="list-style-type: none"> <li>• Finance (Scholarships &amp; Chapter Grants Chair)</li> <li>• Region Growth &amp; Development (Vol.</li> </ul>

**IABC Heritage Region  
2008-2009 Action Plan Final  
October 12, 2008**

		Recruitment & Retention Chair & MAL Chair)
	<p>Conduct a planning cycle during the May-September transition phase of the Board and Officers:</p> <ul style="list-style-type: none"> <li>• HR Officers review IABC IEB Strategic Plan modifications no later than June 1, 2008 (on hold because IEB changed format.)</li> <li>• HR Board conducts action planning for 2008-2009 Board no later than August, 2008. Use previous May “results-against-plan” meeting data as a basis of discussion.</li> <li>• HR approves the Heritage Region Action Plan for 2008-2009 no later than September 30, 2008.</li> <li>• HR Board reviews progress against the 2007-2008 Action Plan no later than May, 2009.</li> <li>• HR Board conducts action planning for 2009-2010 Board no later than August, 2009.</li> <li>• HR approves the Heritage Region Action Plan for 2008-2009 no later than September 30, 2009.</li> </ul>	<p>Region Director, Director-elect, Officers &amp; Board</p> <p>Conducted by Region Director-Elect</p> <p>Conducted by Region Director</p> <p>Conducted by Region Director</p> <p>Conducted by Region Director-Elect</p> <p>Conducted by Region Director</p> <p>Conducted by Region Director</p>
	HR Business Plan and updates to be posted on the web site and HR eXchange site.	<ul style="list-style-type: none"> <li>• Communications</li> </ul>

**IABC Heritage Region  
2008-2009 Action Plan Final  
October 12, 2008**

<b>1.0 LEARNING and GROWTH</b>		
<b>Critical Success Factor</b>	<b>Actions</b>	<b>Portfolios</b>
<b>1.3 IABC has effective programs and services in place to support chapters.</b>  <i>Are we providing the right resources and are they being evaluated and used?</i>	Cross-portfolio team to support struggling chapters, developmental chapters and student chapters by providing information on IABC resources including Chapter Development Fund, Triage Program and scholarships to LI. Assist chapters with process to engage in these programs. (post and/or link to resources on IABC site)	<ul style="list-style-type: none"> <li>• Regional Growth and Development (New Chapter Dev. Chair)</li> <li>• Chapter Relations</li> <li>• Finance (Scholarships &amp; Grants Chair)</li> <li>• Communications</li> </ul>
	Identify struggling chapters & evaluate how we help to stop negative growth in membership. Consider the value of incentives/recognition for those who are showing growth.	<ul style="list-style-type: none"> <li>• Regional Growth and Development</li> <li>• Chapter Relations</li> </ul>
	Add leader section of the website that will highlight a best practice from a chapter at least once each quarter. These are identified at the liaison level and communicated to the Chapter Relations Chair who is responsible for identifying the best and, working with the liaison and chapter leader, drafts and submits an article detailing the activity to the Communications Director. <ul style="list-style-type: none"> <li>• Branding accomplishments/best practices of chapters</li> </ul>	<ul style="list-style-type: none"> <li>• Communications</li> <li>• Chapter Relations</li> <li>• Brand Champion</li> </ul>
	Continue to identify and work with developmental chapters, student chapters, special interest groups (SIGS) and possibly unaffiliated academies of educators and/or researchers.	<ul style="list-style-type: none"> <li>• Region Growth &amp; Development (New Chapter Development)</li> </ul>
	MAL Chair to evaluate what is best needed to engage MALs (evaluate use of eXchange as MAL Forum, teleseminars, webinars)	<ul style="list-style-type: none"> <li>• Region Growth &amp; Development (MAL Chair)</li> </ul>

<b>1.0 LEARNING and GROWTH</b>		
<b>Critical Success Factor</b>	<b>Actions</b>	<b>Portfolios</b>
<b>1.4 IABC delivers quality professional development opportunities to members</b>	Re-evaluate need for Seminar Chair position and whether responsibilities can be included under Communication Chair.	<ul style="list-style-type: none"> <li>• Leadership Development (Seminars Chair)</li> </ul>
	Promote professional development opportunities through the region's website, marketing e-blasts, and direct mail. Consider other avenues for communicating as e-mail begins losing its effectiveness.	<ul style="list-style-type: none"> <li>• Prof. Development</li> <li>• Leadership Development (Seminars Chair)</li> <li>• Communications</li> </ul>
	Develop a speakers' bureau to provide chapters with	<ul style="list-style-type: none"> <li>• Professional</li> </ul>

**IABC Heritage Region  
2008-2009 Action Plan Final  
October 12, 2008**

	quality speakers for a more reasonable fee than International provide.	<p>Development (special task leader appt. by director – Camille Downing/past region director)</p> <ul style="list-style-type: none"> <li>• Region Growth &amp; Development</li> <li>• Seminars Chair</li> </ul>
	Develop a regional sponsorship plan for the coming year, primarily focused on conference and awards programs.	<ul style="list-style-type: none"> <li>• Finance (sponsorship chair)</li> </ul>
	Accreditation Chair to develop a regional plan to support accreditation.	<ul style="list-style-type: none"> <li>• Professional Development (Accreditation Chair)</li> </ul>
	Evaluate the interest in an Accreditation workshop during Leadership Forum 2009 or pre-conference workshop.	<ul style="list-style-type: none"> <li>• Professional Development (Accreditation Chair)</li> </ul>
	Continue to offer Accreditation exam offered at regional conferences as an option.	<ul style="list-style-type: none"> <li>• Professional Development (Accreditation Chair)</li> </ul>
	Evaluate continuation of virtual accreditation groups.	<ul style="list-style-type: none"> <li>• Professional Development (Accreditation Chair)</li> </ul>
	Accredited members recognized at regional conference, on regional website, and with engraved Cross pens.	<ul style="list-style-type: none"> <li>• Professional Development (Accreditation Chair)</li> <li>• Communications</li> </ul>
<p><b>1.5</b></p> <p><b>IABC recognition programs identify and spotlight excellence in communications, and enhance the visibility of the communication profession</b></p>	<p>Conduct a profitable 2009 Silver Quill competition that aligns with best practice recommendations from 2008 chair, aligns with Gold Quill and allows the winners to be honored at the '09 region conference.</p> <p>Note: 2009 Chair must hit the ground running by early 2009 Schedule should be put in place by 2008 co-chairs, including possible theme. Survey of this year's judges asked about best time or year to judge, given the constraints of awarding winners in October. Evaluate responses and determine best date to start planning process for next year awards. Evaluate changing Awards Chair term of office so there is overlap with succeeding chair(s).</p>	<ul style="list-style-type: none"> <li>• Professional Development (Silver Quill co-chairs)</li> </ul>
	Provide information on EXCEL program and encourage participation by HR chapters. Promote program through various communication vehicles.	<ul style="list-style-type: none"> <li>• Leadership Development (Recognition Chair)</li> <li>• Chapter Relations</li> <li>• Communications</li> </ul>
	HR Board and Recognition Chair consider nominating those who "EXCEL" in the Heritage Region among Region member companies for IABC or HR award.	<ul style="list-style-type: none"> <li>• Communications</li> <li>• Chapter Relations</li> <li>• Leadership Development</li> </ul>

**IABC Heritage Region  
2008-2009 Action Plan Final  
October 12, 2008**

	(NYC 10/2007 award to IBM exec could be a starting point model.)	(Recognition Chair)
<b>2.0 BUSINESS PROCESSES</b>		
	<b>The Heritage Region will integrate the IABC brand promise and brand identify into all of the actions, events and materials associated with Business Processes</b>	<b>Brand Champion serves as facilitator/resource</b>
<b>Critical Success Factor</b>	<b>Actions</b>	<b>Portfolios</b>
<b>2.2 IABC communication technology is up-to-date, reliable, member/customer-friendly, transparent and as economic as possible across the association.</b>	Region develops its own database to capture information for purposes of recruiting members for regional and international positions, task forces and committees	<ul style="list-style-type: none"> <li>Region Growth &amp; Development (Volunteer Recruitment &amp; Retention Chair)</li> <li>Past Region Director</li> </ul>
	Until we are able to refine our MMA mailing, we will conduct all HR board activities through email and evaluate eXchange as communication vehicle.	<ul style="list-style-type: none"> <li>Communications</li> </ul>
	HR Communications Director maintains accurate lists of all chapter leaders, by position on the HR web site. <ul style="list-style-type: none"> <li>Archive Yahoo history (CD or eXchange).</li> </ul>	<ul style="list-style-type: none"> <li>Communications</li> <li>Chapter Relations</li> </ul>

<b>2.0 BUSINESS PROCESSES</b>		
<b>Critical Success Factor</b>	<b>Actions</b>	<b>Portfolios</b>
<b>2.3 IABC has programs and procedures in place to identify prospective members.</b>	Follow-up with membership and chapter contact information with non-members and students who attend International and regional conferences.	<ul style="list-style-type: none"> <li>Region Growth &amp; Development</li> </ul>
	Collaboratively ensure chapters know about Prospect List, <b>keep it up-to-date</b> , and encourage chapters to actively recruit these prospects.	<ul style="list-style-type: none"> <li>Region Growth &amp; Development</li> <li>Chapter Relations</li> </ul>
	MAL Chair encourages prospects who fall into the MAL category to become members	<ul style="list-style-type: none"> <li>Region Growth &amp; Development (MAL Chair)</li> </ul>
	Continue to use instant polling to gauge member interest tied to a conference or workshop content.	<ul style="list-style-type: none"> <li>Conference Committee</li> <li>Communications</li> </ul>
<b>2.4 IABC grows the body of knowledge related to business communication and makes it available to members and</b>	Communications Director to develop a plan to integrate available IABC tools about knowledge center offerings with HR web site and other HR vehicles.	<ul style="list-style-type: none"> <li>Communications</li> </ul>
	Create more regional visibility for the IABC Research Foundation.	<ul style="list-style-type: none"> <li>Finance (Foundation Liaison)</li> <li>Communications</li> </ul>
	Communications Director maintains & maximizes hyperlinks from regional website to appropriate IABC	<ul style="list-style-type: none"> <li>Communications</li> <li>Portfolio Directors &amp;</li> </ul>

**IABC Heritage Region  
2008-2009 Action Plan Final  
October 12, 2008**

customers.	online library and resources.	Chairs
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<b>2.0 BUSINESS PROCESSES</b>		
<b>Critical Success Factor</b>	<b>Actions</b>	<b>Portfolios</b>
<b>2.5 IABC, through the IABC Research Foundation, offers groundbreaking research to its members and customers.</b>	Keep the Board informed of opportunities for Region engagement. (Research Foundation to better define the liaison role.)	<ul style="list-style-type: none"> <li>Finance (Foundation Liaison)</li> </ul>
	Develop a regional plan for support of the Research Foundation. The plan to include encouragement of donations to the Foundation and identification of volunteers for Foundation activities, such as Think Tank or research studies.	<ul style="list-style-type: none"> <li>Finance (Foundation Liaison)</li> <li>Region Growth &amp; Development (Volunteer Recruitment &amp; Retention)</li> <li>Leadership Development (Recognition Chair)</li> </ul>
	Continue to allocate funds for donation of annual Region gift to the Research Foundation.	

<b>2.6 IABC's governance structure facilitates communication, cooperation and interaction among all levels of the organization.</b>	Region Director to continue to bring key COR issues to the HR Board for discussion. Board and chapters to bring issues to Region director to discuss at COR level.	<ul style="list-style-type: none"> <li>Region Director</li> <li>Chapter Relations</li> </ul>
	Region Director and Region Director-elect monitor IEB activities on governance; update region board on details and implications, as necessary; and facilitate annual updates to regional plans by region board so as to reflect IEB actions. ( <a href="#">Region Plan updates to reflect IEB plan on hold because IEB changed format.</a> )	<ul style="list-style-type: none"> <li>Region Director</li> <li>Region Director-Elect</li> </ul>
<b>2.7 The IABC brand is strengthened through effective public relations, advertising and strong brand practices at all levels of the organization</b>	Hold activities at the regional level to promote understanding and usage of the Brand and Be Heard® <ul style="list-style-type: none"> <li>Brand champion to continue to participate in roundtable calls and report back to board on relevant information</li> <li>Continue to incorporate "Be Heard®" in all regional marketing and communications.</li> <li>Recognize branding efforts by chapters in 2007-2008 at the 2008 Leadership Forum.</li> </ul>	<ul style="list-style-type: none"> <li>Region Director</li> <li>Past Region Director</li> <li>Communications</li> <li>Leadership Development (Training Chair)</li> <li>Brand Champion</li> <li>Chapter Relations</li> </ul>
	Develop an annual comprehensive communications plan for the Region, including news opportunities such as publicizing new officer elections and award winners.	<ul style="list-style-type: none"> <li>Communications</li> </ul>
	HR serves as resource to the chapters for the use of	<ul style="list-style-type: none"> <li>Brand Champion</li> </ul>

**IABC Heritage Region  
2008-2009 Action Plan Final  
October 12, 2008**

	branding and marketing content created at the international level and made available for chapters to customize.	<ul style="list-style-type: none"> <li>• Communications</li> </ul>
	Promote our vision and mission to chapter leaders and all members via the HR website in all of the regional activities and communications and through partnerships with chapters.	<ul style="list-style-type: none"> <li>• Communications</li> <li>• Chapter Relations</li> <li>• All Portfolios</li> </ul>

<b>3.0 CUSTOMERS</b>		
	<b>The Heritage Region will integrate the IABC brand promise and brand identify into all of the actions, events and materials associated with Business Processes</b>	<b>Brand Champion serves as facilitator/resource</b>
<b>Critical Success Factor</b>	<b>Actions</b>	<b>Portfolios</b>
<b>3.1</b>		
<b>IABC maintains high member satisfaction/value-for-membership ratings.</b>	<p>Conduct formal evaluations of: leadership forum, regional conference, &amp; regional roundtable calls.</p> <ul style="list-style-type: none"> <li>• <b>COVERED UNDER REGION SPECIFIC.</b></li> </ul>	<ul style="list-style-type: none"> <li>• Leadership Development</li> <li>• Conference co-chairs</li> <li>• Chapter Relations Chair</li> </ul>
<i>What is Regional support is expected or desired by our members and chapters?</i>	<p>Conduct formal evaluation of Silver Quill and Accreditation programs among both participants and non-participants</p> <ul style="list-style-type: none"> <li>• <b>COVERED UNDER REGION SPECIFIC.</b></li> </ul>	<ul style="list-style-type: none"> <li>• Silver Quill Co-Chairs</li> <li>• Professional Development (Accreditation Chair)</li> </ul>
	<p>Coordinate all evaluations through Communications Director to prevent “many emails from many people” situations.</p> <ul style="list-style-type: none"> <li>• <b>COVERED UNDER REGION SPECIFIC.</b></li> </ul>	<ul style="list-style-type: none"> <li>• Communications</li> <li>• ALL</li> </ul>
<b>3.2</b>		
<b>IABC retains current members.</b>	Raise retention to 85% by 2009. (HR @ 73% in June 2008)	<ul style="list-style-type: none"> <li>• Region Growth &amp; Development</li> </ul>
	Update and implement HR recognition plan to include conference recognition. Expand plan to extend down to chapters and promote IABC programs.	<ul style="list-style-type: none"> <li>• Leadership Development (Recognition Chair)</li> </ul>
	Research and assess chapter leader needs and develop plan for ways to provide recognition support at the chapter level. [See section 1.1]	<ul style="list-style-type: none"> <li>• Leadership Development</li> <li>• Chapter Relations</li> </ul>
	Research and make recommendations for Par Excellence vs. CMA type of program to recognize chapter and regional leaders.	<ul style="list-style-type: none"> <li>• Leadership Development (Recognition Chair)</li> <li>• Chapter Relations</li> <li>• Finance (Scholarships &amp; Grants Chair)</li> <li>• Region Growth &amp; Development</li> </ul>

**IABC Heritage Region  
2008-2009 Action Plan Final  
October 12, 2008**

	Through all of the activities identified we will have created information, marketing and other materials that will be available through e-blasts and on the web site to enable members to highlight the benefits of membership. Information, marketing and other materials will incorporate the IABC brand promise and identity.	<ul style="list-style-type: none"> <li>• Communications</li> <li>• Brand Champion</li> </ul>
	Encourage chapters to share the recruitment techniques/materials through a leader section on regional web site.	<ul style="list-style-type: none"> <li>• Communications</li> <li>• Chapter Relations</li> <li>• Region Growth &amp; Development (Volunteer Recruitment &amp; Retention Chair)</li> </ul>
	Evaluate and recommend plan to approach major employers throughout the region for opportunities to convert to corporate memberships with the addition of more communicators from those organizations.	<ul style="list-style-type: none"> <li>• Region Growth &amp; Development</li> </ul>
	Work with chapters to identify and approach businesses for corporate membership.	<ul style="list-style-type: none"> <li>• Chapter Relations</li> <li>• Region Growth &amp; Development Director</li> </ul>
	Evaluate the success of offering special rates for COs and their staff members to attend 2008 regional conference.	<ul style="list-style-type: none"> <li>• Conference committee</li> <li>• Board</li> <li>• Finance</li> </ul>
	Provide relevant content for HR web site to promote the value of accreditation and promote HR accreditation workshops and testing. Recognize newly accredited members in Leader Letter.	<ul style="list-style-type: none"> <li>• Professional Development (Accreditation Chair)</li> <li>• Communications</li> </ul>
<b>3.3</b>  <b>IABC is the professional association of choice for communicators worldwide</b>	Report Heritage Region media coverage and successes on the website.	<ul style="list-style-type: none"> <li>• Communications</li> </ul>
	Consider Regional promotion of the Chapter Management Awards as not only a way to assess the health of your chapter but to use the exercise/process as a learning and growth opportunity for current and future chapter leaders.	<ul style="list-style-type: none"> <li>• Leadership Development (Recognition Chair)</li> <li>• Chapter Relations</li> </ul>
	Look for more ways to promote CMA within region: <ul style="list-style-type: none"> <li>• Consider session at Leadership Forum, another roundtable, and/or eXchange virtual group.</li> </ul>	<ul style="list-style-type: none"> <li>• Leadership Development (Training Chair &amp; Recognition Chair)</li> </ul>
	Obtain information on who is participating in CMA from our region and how to assist chapters that might not have the knowledge to apply. Promote best practices of winners.	<ul style="list-style-type: none"> <li>• Leadership Development (Recognition Chair)</li> <li>• Chapter Relations</li> </ul>
	Continue to educate the Region about IABC Advocacy efforts including session at Leadership Forum and information on the web site.	<ul style="list-style-type: none"> <li>• Leadership Development</li> <li>• Communications</li> <li>• Brand Champion</li> </ul>
	Evaluate the value of sharing HR Region MAL mailing list among chapters in Region to facilitate invitations to attend chapter meetings and events while MALS are	<ul style="list-style-type: none"> <li>• Region Growth &amp; Development (MAL Chair)</li> </ul>

**IABC Heritage Region  
2008-2009 Action Plan Final  
October 12, 2008**

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**IABC Heritage Region  
2008-2009 Action Plan Final  
October 12, 2008**

<p><b>3.5</b></p> <p><b>IABC is visible to potential members in a variety of professional settings</b></p> <p>Do we understand the value of growth? Who is our membership? Are we prepared to meet the needs our growth might require?</p>	<p>Publicize chapter partnerships and collaborations on regional web site.</p>	<ul style="list-style-type: none"> <li>• Communications</li> <li>• Chapter Relations</li> </ul>
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<b>5.0 SPECIFIC TO HERITAGE REGION</b>		
	<b>The Heritage Region will integrate the IABC brand promise and brand identify into all of the actions, events and materials associated with Business Processes</b>	<b>Brand Champion serves as facilitator/resource</b>
<b>Critical Success Factor</b>	<b>Actions</b>	<b>Portfolios</b>
<b>5.1.5</b> <b>Heritage Region recognition programs identify and spotlight excellence in communications, and enhance the visibility of the communication profession.</b>	<u><b>See Section 1.4</b></u> Accredited members recognized at regional conference and on regional website.	<ul style="list-style-type: none"> <li>• Professional Development (Silver Quill chair)</li> </ul>
	<u><b>See: Section 1.5</b></u> Silver Quill winners recognized at regional conferences	<ul style="list-style-type: none"> <li>• Professional Development (Silver Quill chair)</li> </ul>
	<u><b>See: Section 1.5</b></u> Communications Director provides information on EXCEL program and participation.	<ul style="list-style-type: none"> <li>• Communications</li> <li>• Chapter Relations (Chapter Liaisons)</li> <li>• Leadership Development (Recognition Chair)</li> </ul>
	<u><b>See: Section 1.5</b></u> HR Board and committee chairs identify potential EXCEL nominees among Region member companies.  Recognize those who "EXCEL" in HR Region on the website.	<ul style="list-style-type: none"> <li>• ALL</li> </ul>
	<u><b>See: Section 1.5</b></u> Update current recognition plan.	<ul style="list-style-type: none"> <li>• Leadership Development (Recognition Chair)</li> </ul>
	<u><b>See: Section 1.1</b></u> Research and assess chapter leader needs and develop plan for ways to provide recognition support at the chapter level.	<ul style="list-style-type: none"> <li>• Leadership Development (Recognition Chair)</li> <li>• Chapter Relations</li> </ul>

**IABC Heritage Region  
2008-2009 Action Plan Final  
October 12, 2008**

	<u><b>See: Section 3.2</b></u> Research and make recommendations for Par Excellence vs. CMA type of program to recognize chapter and regional leaders.	<ul style="list-style-type: none"> <li>• Leadership Development (Recognition Chair)</li> <li>• Chapter Relations</li> </ul>
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**5.0 SPECIFIC TO HERITAGE REGION**

<b>Critical Success Factor</b>	<b>Actions</b>	<b>Portfolios</b>
<b>5.2.1</b>  <b>Heritage Region has responsive, member/customer focused* business systems and procedures in place.</b>	Work with HR board and committee chairs to annually review and update Policies and Procedures manual.	<ul style="list-style-type: none"> <li>• Region Director-elect</li> </ul>

<b>5.2.6</b>  <b>Heritage Region's governance structure facilitates communication, cooperation and interaction among all levels of the organization</b>	Assess board and committee needs prior to the Call for Nominations for the 2008-2009 Board. <ul style="list-style-type: none"> <li>• Follow the Nomination Plan for 2009-2010 recruiting.</li> <li>• Explore various ways of communicating with IABC leaders the volunteer opportunities (web site, leader letter, at conferences and beyond.)</li> </ul>	<ul style="list-style-type: none"> <li>• Past Region Director acts as chair of nominating committee.</li> <li>• Region Growth &amp; Development (Volunteer Recruitment &amp; Retention Chair)</li> <li>• ALL</li> </ul>
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<b>5.3.1</b>  <b>Heritage Region maintains high member satisfaction/value-for-membership ratings.</b>	<u><b>SEE: Section 3.1</b></u> Conduct formal evaluations of: leadership forum, regional conference, regional roundtable calls, Silver Quill, Accreditation – among members and non-members; participants and non-participants.  Determine a central repository for such research (consider eXchange)	<ul style="list-style-type: none"> <li>• Professional Development Director</li> <li>• Silver Quill Chair</li> <li>• Chapter Relations Chair</li> <li>• Accreditation Chair</li> <li>• Leadership Development (Training Chair)</li> </ul>
	Continue to coordinate all evaluations through Communications Director to prevent “many emails from many people” situations.	<ul style="list-style-type: none"> <li>• Communications</li> </ul>

<b>5.4.1</b>  <b>Heritage Region is profitable.</b>	HR Board receives and approves a balanced annual budget. <ul style="list-style-type: none"> <li>• Officers review budget monthly and take corrective action where necessary.</li> </ul>	<ul style="list-style-type: none"> <li>• Finance</li> <li>• All</li> </ul>
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**IABC Heritage Region  
2008-2009 Action Plan Final  
October 12, 2008**

	<p>Seek out remedial and new sources of revenue.</p> <ul style="list-style-type: none"> <li>Expand sponsorship program for 2008-2009 for additional revenue</li> </ul>	
	<p>ROI of principal revenue-producing programs and services is measured annually, with a particular push in 2008-2009 toward Conference, and 2009 Silver Quill being not only profitable but reaching or exceeding revenue targets.</p>	<ul style="list-style-type: none"> <li>Finance</li> <li>ALL</li> </ul>
	<p>HR Board recommends measures to improve financial results before the end of its term.</p>	<ul style="list-style-type: none"> <li>Finance</li> <li>ALL</li> </ul>

<b>5.0 SPECIFIC TO HERITAGE REGION</b>		
<b>Critical Success Factor</b>	<b>Actions</b>	<b>Portfolios</b>
<b>5.4.2</b>  <b>Heritage Region's revenues are diverse.</b>	Annually review revenue by source and money-handling practices.	<ul style="list-style-type: none"> <li>Finance</li> <li>ALL</li> </ul>
	Regularly review performance of non-dues revenue sources.	<ul style="list-style-type: none"> <li>Finance</li> <li>All</li> </ul>
<b>5.4.3</b>  <b>Financial oversight is complete in the Heritage Region.</b>	HR Board receives detailed financial reports monthly from the Finance Director and Bookkeeper and questions Finance Director and Region Director on said reports to ensure that they fully understand region's financial picture.	<ul style="list-style-type: none"> <li>Finance</li> <li>All</li> </ul>
	Finance Director maintains close contact and supervisory role with the contracted bookkeeper.	<ul style="list-style-type: none"> <li>Finance</li> </ul>
	Re-evaluate and revise our current financial processes, create a financial committee, and consider an annual independent audit or "compilation of records" review and budget for the following fiscal year.	<ul style="list-style-type: none"> <li>Finance</li> <li>Officers</li> </ul>