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## HBA Engagement COE Orientation

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[HBAnet.org](http://HBAnet.org)

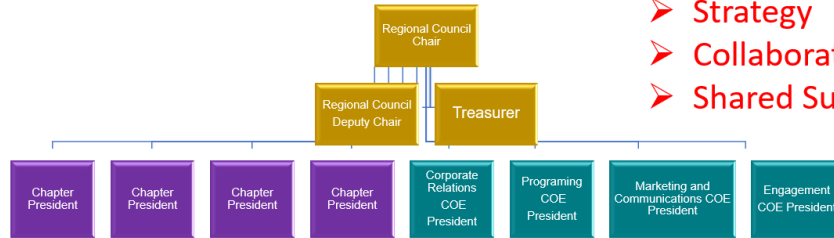


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- **Regional Council**
  - COE Committees
  - Cross-organizational relationships
  - HBA Staff Support
  - Functional Calls
  - Chapter Migration Information
- 



## Regional Council

Regional Executive Committee + Chapter Presidents + COE Presidents



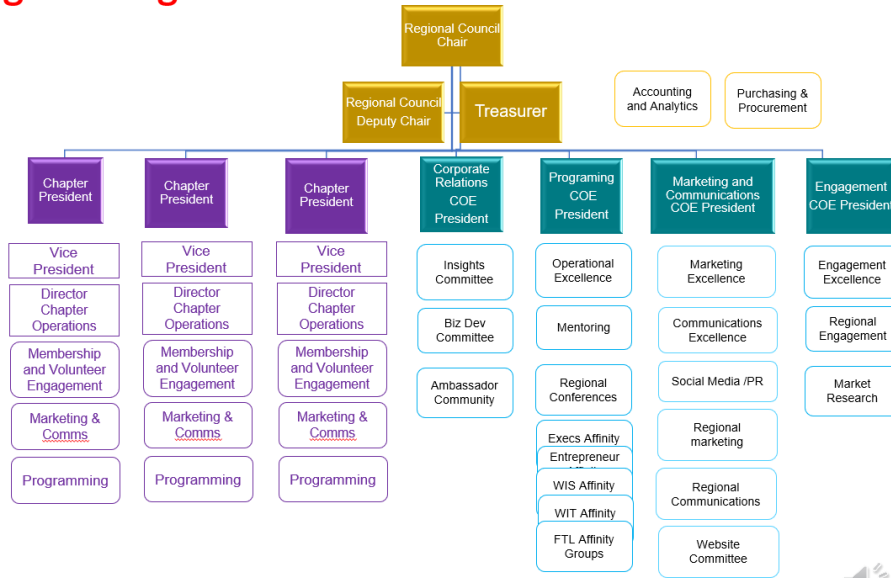
- Strategy
- Collaboration
- Shared Success

**Purpose:** create member experience in local geography. Programming, engagement, volunteering, communications.

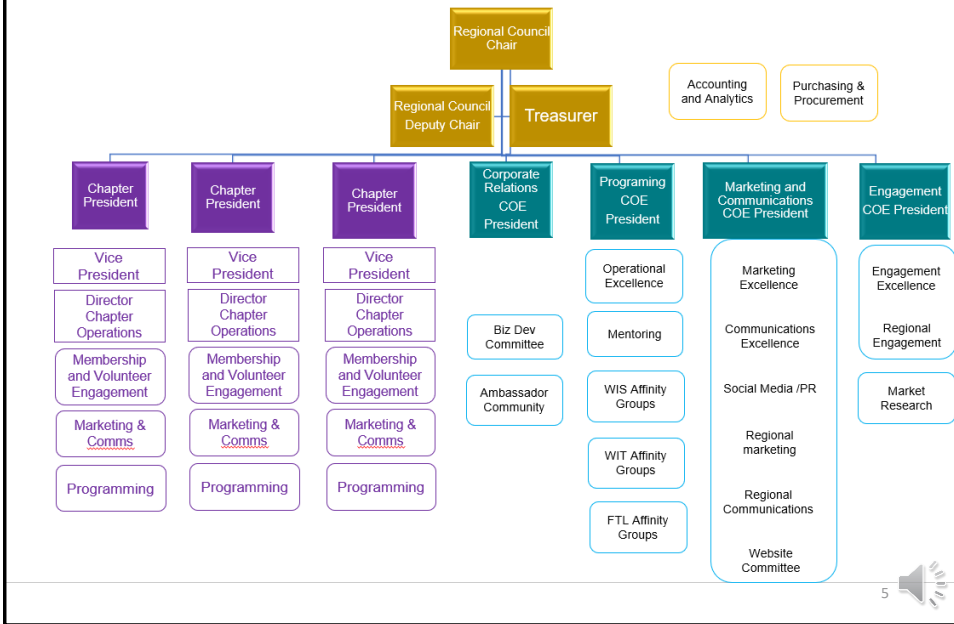
**Purpose:** Corporate Partner engagement; region wide programming and engagement strategies.  
HBA marketing communication coordination;



## Regional Organization – Ideal End State

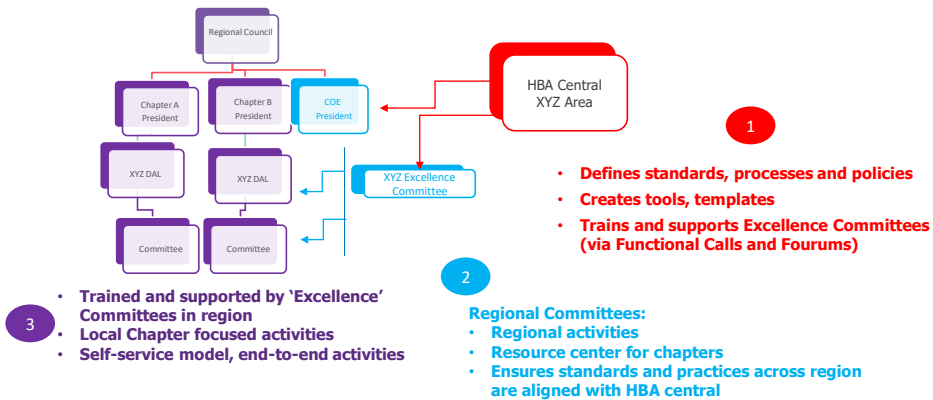


## Regional Organization – 2018 Model



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## Illustration of training and support model across HBA Central, Regions and Chapters for Programming, Marketing & Comms and Engagement COE



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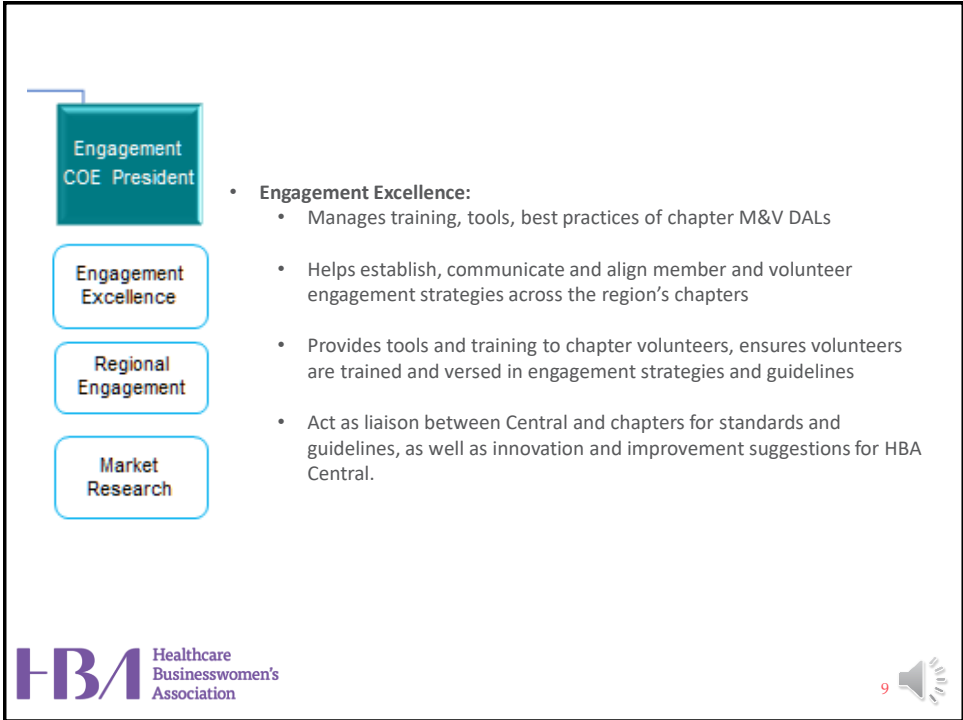


## Engagement COE

- Aligning member and volunteer engagement strategies across the region and overarching HBA engagement innovations;
  - Support/guidance for the chapters – strategy for outreach calls/renewal reminders, member orientations, member engagement events, volunteer recognition
- Member and volunteer engagement (Chapter unspecified);
  - Implementing the above strategies for those in the region who are not aligned to a chapter
- Ensuring chapter committees have appropriate training, tools and support for Membership and volunteer engagement activities
  - Engagement Excellence director – hold calls with the chapter DALs/committee leads
- Support recruitment and appointment of senior leaders across the region

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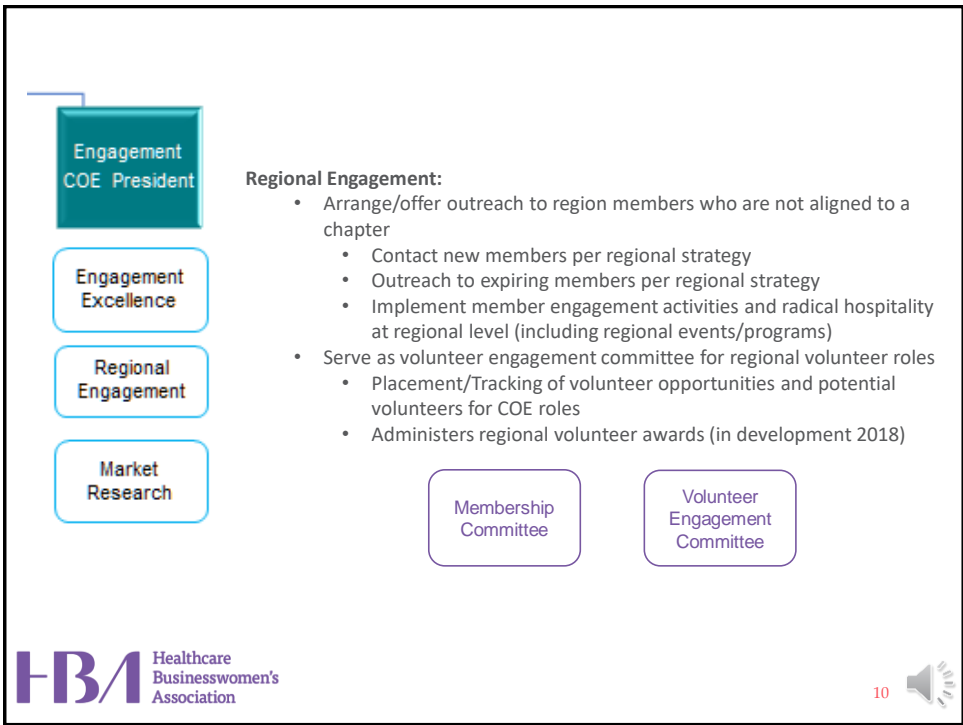
**Engagement COE President**

- Engagement Excellence**
- Regional Engagement**
- Market Research**

- **Engagement Excellence:**
  - Manages training, tools, best practices of chapter M&V DALs
- Helps establish, communicate and align member and volunteer engagement strategies across the region's chapters
- Provides tools and training to chapter volunteers, ensures volunteers are trained and versed in engagement strategies and guidelines
- Act as liaison between Central and chapters for standards and guidelines, as well as innovation and improvement suggestions for HBA Central.

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**Engagement COE President**


- Engagement Excellence**
- Regional Engagement**
- Market Research**

**Regional Engagement:**

- Arrange/offer outreach to region members who are not aligned to a chapter
  - Contact new members per regional strategy
  - Outreach to expiring members per regional strategy
  - Implement member engagement activities and radical hospitality at regional level (including regional events/programs)
- Serve as volunteer engagement committee for regional volunteer roles
  - Placement/Tracking of volunteer opportunities and potential volunteers for COE roles
  - Administers regional volunteer awards (in development 2018)

**Membership Committee**      **Volunteer Engagement Committee**

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**Engagement COE President**

**Engagement Excellence**

**Regional Engagement**

**Market Research**

**Market Research:**

- Analyze event surveys for chapter and regional programs; make recommendations to programs COE
- Conduct membership and volunteer satisfaction surveys in conjunction with HBA Central
- Conduct research on regional/chapter marketing and social media efforts as requested
- Conduct ad hoc market research based on chapter needs

Event Evaluation Committee

Marketing and Social Media Research Committee

Membership Survey Committee

Ad Hoc Research Committee

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## Cross-Organizational Relationships COE President



- Participates on the regional council (Regional executive committee, Chapter presidents, COE Presidents.)
- Works with Membership, Volunteer Engagement, and Market Research Global Committee Chairs to understand broader HBA goals/strategy
- Manages regional directors
- May co-lead regional nominating committee with Deputy Chair.

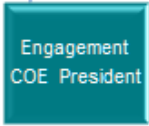


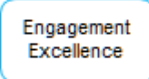
## Cross-Organizational Relationships Engagement Excellence Reg. Dir.

- Works with COE President to create regional strategy/standards.
- Works with chapters to ensure implementation of regional goals/strategy/standards through training and operational support.

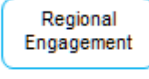






Engagement  
COE President



Engagement  
Excellence




Regional  
Engagement




Market  
Research

## Cross-Organizational Relationships Regional Engagement Director

- Works with the rest of the regional council to determine where regional volunteers are needed and link potential volunteers to opportunities.
- Works with HBA staff to post volunteer opportunities to Volunteer Center.





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Engagement  
COE President



Engagement  
Excellence



Regional  
Engagement



Market  
Research

## Cross-Organizational Relationships Market Research Reg. Director

- Works with Programs COE to provide information/feedback from post-event surveys.
- Works with HBA Staff to create/improve membership surveys and research projects.
- Works with COE President and chapters to provide ad hoc research assistance as needed.





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## Support from the central organization

- Global Committee Chairs
  - **Membership: Jennifer Blanchard (NY/NJ, NY – Pfizer)**
  - **Volunteer Engagement: Marge Josephson (Pacific, SFO – Bay City Capital)**
  - **Market Research: Shetal Vyas (Mid-Atlantic, Philadelphia – Pentec Health)**
- Co-lead functional calls with HBA Staff
- Strategic planning for the organization
- Ensure the flow of strategy from HBA Board > Regions
- Lead task forces to develop new processes and offerings (ex., Volunteer awards development, member journey map)

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## Support from the central organization

- HBA Staff – Petrina Hurtado, HBA Manager, Membership
  - Co-leads functional calls, provides updates from HBA Central
  - Technical assistance with reports, website, etc.
  - Assist with HBA Policy questions, sharing best practices among regions/chapters
  - Coordinates and communicates enhancements to HBA standard volunteer awards and other offerings
  - Conducts HBA-wide research, provides insights (Membership Survey)

## HBA Policies to know

- Leader appointments
- Mediation policy – escalation and resolution of volunteer conflict
- Financial policies – handling and spending of HBA money
- **Membership pricing policies**
- **Volunteer Policies**
  - **Membership requirements**
  - **Conflict of Interest**
  - **Confidentiality**
  - **Code of Conduct**
- **Membership events policies**
- **Volunteer Recognition**

Policy documents found  
in Leader Library and on  
HBA Volunteer Resource  
Center (coming soon)

## HBA Marketing and Communications Policies

- **Branding** – provides brand guidelines, style guides, photo, templates to ensure integrate of our brand: looks, messaging, positioning
- **Emailing / promotions** – rules to protect HBA from CAN Spam legislations and member 'Opt Outs'
  - NO emailing to groups > 15 people
  - No independent mailing of chapter newsletters or broad communications (outside of HBA Chapter Community)
  - Work with Central to set up distributions and processes
- **Social Media** – specifics appropriate use of LinkedIn, Facebook, Twitter, YouTube, Instagram and WordPress (blog)

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## Functional Calls

- Membership/Volunteer Engagement calls (co-led by Global Committee Chairs)
  - Held monthly – 2<sup>nd</sup> Wednesday, 1pm.
  - Optional: COE Presidents
  - Required: Engagement Excellence Regional Directors
  - Call for questions/topics will be sent two weeks prior
  - Time built into agenda for open forum, sharing best practices/challenges/performance updates
  
- Market Research calls (Co-led by Global Committee Chair)
  - Every other month- schedule TBD
  - Required: Market Research Regional Directors
  - Optional: Committee Leaders
  - Share best practices/challenges/performance updates
  - Receive information about research projects being done by Central
    - Opportunities to participate in projects as available

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## Chapter Migration Plan

- Individuals in chapters that are going to be changing/splitting were sent an email today (1/24) asking them to confirm or select one of the new chapters
- Members who do not select a chapter will be “unspecified” within the region until they select a chapter

In many cases, no action is necessary...

- There are some chapters which already had “subchapters” in our system:
  - Southern California – Los Angeles, San Diego
  - Europe – Suisse Romande, Zurich, Basel, Frankfurt, etc
- Individuals in these subchapters which correspond to one of the new chapters will be moved to the new chapter automatically – will receive an email explaining this but also encouraging them to log in and confirm
- Communications will still be region-wide, so event digest emails and other announcements will still go to everyone in the region



## Next steps

- COE Presidents, Engagement Excellence Directors, Market Research Directors: watch for functional call invites, calls begin in February
- More procedural operations training materials will be available soon
- 1:1 calls for each region’s COE President and Engagement Excellence director with Petrina to discuss regional goals and planning – look for sign-up email later today
- In the meantime, reach out to Petrina with questions – [phurtado@hbanet.org](mailto:phurtado@hbanet.org)
- Thank you!

