REGIONAL STRATEGY BOARD

INTRODUCTION TO RSB STRATEGY

(October 2010 – version 2)

Improving the world through engineering

Contents

1. What is the Regional Strategy Board (RSB)?

Background

The Regional Strategy Board (RSB) represents the active UK Regional network, reporting directly to Trustee Board.

RSB is one of the main Boards of the Institution and sits within IMechE's Engineering Directorate (**Appendix a**). The Board receives direct HQ support from the Regional and International Operations Department (RIO). Together, the Regional network delivers an enormous variety of events, services and community engagement projects that contribute directly to IMechE's strategy (**Appendix b**)

Purpose

The purpose of RSB is to:

- Facilitate the implementation of the strategy set by the Trustee Board
- Develop and continually review Regional activities of the Institution across the UK and Ireland, and advise Trustee Board accordingly
- Advise Trustee Board of progress and areas of potential opportunities/concern

It also aims to develop, review and co-ordinate the strategies and activities of the various Region, Area and Young Member Panels which support the Institution's vision and strategic objectives.

Composition

The Regional Strategy Board is comprised of:

- A Chair - a member of the Trustee Board nominated by the President, normally a Deputy or Vice President
- A Vice Chair - proposed by the Chairman
- Chairs of the Regions (alternates accepted preferably Vice Chairs)
- Representative from the Young Members Board (YMB)
- Representative from the Strategy Advisory Committee (SAC)
- Representative from the Technical Strategy Board (TSB)
- Up to five members co-opted to provide specialist advice from time to time

Meetings

RSB meets three times a year.

The first meeting of the year (in Jan or Feb) is a full day planning meeting. At this meeting, in addition to the Regional Chairs two other representatives are invited to attend from each Region. To aid succession planning we encourage the Vice Chair and a YM to attend.

The second and third meetings are usually held in May and October respectively, either at HQ or within a Region in the UK.

Please see RSB Terms of Reference for further details (**Appendix c**)

2. RSB Strategy

Background

- **March 2007** IMechE developed a new vision, purpose and set of strategic objectives
- **May 2007** All Boards, including RSB, aligned its objectives with the new strategic direction
- **May 2007** Regions agreed a local action plan mechanism to set and report on how the strategy would be delivered locally
- **May 2008** Strategy reviewed and updated
- **May 2010** Strategy reviewed and way forward for 2011 -2012 agreed
- Agreed progress from each Region is submitted quarterly

Regional local action plans are made available to all regions to encourage sharing of best practice.

Strategy

RSB's objectives are reviewed on an annual basis to ensure they reflect the Institution's strategic objectives and take into consideration the diverse and developing nature of the Regional network.

The RSB Objectives are not to limit regional activity but simply to demonstrate regional commitment to supporting the implementation of the strategy and their achievements.

Regional activity is recognised as contributing to the IMechE strategy, in particular the following IMechE strategic objectives:

SO 3) Strengthen our links with Membership and increase member engagement

SO 4) Develop an awareness of engineering and raise the profile of IMechE

The RSB strategy document defines the regional activities needed to meet the Institution's objectives and a reporting method is in place to measure the Regional contribution.

You can see the RSB strategy in (**Appendix d**).

IMechE's strategy is detailed in the left hand column of the table.

Alongside the Institution's strategy are regional objectives. These highlight specific, measurable, achievable, realistic and timely (SMART) actions that Regions agree to deliver under the Institution's objectives.

3. Your role as Regional Chair

As Regional Chair and as part of your role of representing your Region you are required to be actively involved on the RSB. RSB involvement includes:

1) **Attending all RSB meetings, or send a regional representative.**

2) **Ensuring strong communication channels between regional members and RSB, and in effect to the Trustee Board via the RSB chair.**

3) **Contributing to RSB strategy and communicating the strategy to the regional network**

4) **Ensuring that the Area and Young Member Panels in your Region focus on delivering the RSB Strategy**

Gaining buy in from your fellow regional committee members is key to delivering the RSB strategy. To help you communicate the strategy to your local committees there is a sample PowerPoint you can use. (**Appendix e**)

5) Provide quarterly feedback on Regional strategic progress

On a quarterly basis you will be asked to submit your regional local action plan. HQ support is available to help throughout this process. More information on this process is available in section 5.

Through the strategy, RSB is creating an overview of Regional activity. By doing so, it ensures that:

- Applications for funding in future years are supported
- Regional activity is recognised by IMechE and its members
- Best practice is shared amongst the regions
- The regional network is recognised and rewarded for its contributions
- Resources within HQ are made available to support the network

4.   Delivering Objectives

The RSB Objectives demonstrate regional commitment to supporting the implementation of IMechE's Strategy. The objectives and their measurements were agreed by RSB as a method of highlighting achievements and demonstrating the contribution of the Regions to the strategy. This section outlines IMechE's aim; the route RSB has agreed to support them and possible methods of how this can be achieved in 2011.

NOTE: Numbering in the following section relates to that in the RSB strategy (**Appendix d**) therefore may initially appear inconsistent.

4.1) Aim - IMechE Strategic Objective 1: Broaden and grow Membership

RSB Implementation:

1.1

1) Each Region to hold at least one "Get Registered" event

2) Each Region to hold at least one Professional Review Workshop

1.3

1) 100% Regions holding Fellow workshops.

2) Fellow network established in each Region to ensure potential Fellows have access to mentors and sponsors.

Method:

Working with their local Business Development Manager (BDM), a Region could achieve these by supporting:

- Get Registered event: A get registered event can be held in conjunction with a BDM to provide an overview of IMechE, the benefits and the range of membership grades and classes. This is a good way to introduce the IMechE to potential members. The BDM will provide attendees with the follow-up support at their workplace to help them achieve their goals, including free objective feedback on their Professional Review Report.
- Professional Review Workshop: This workshop will provide a comprehensive insight to the application process for Chartered or Incorporated Engineer and EngTech. The presentation will cover the requirements for application including guidance concerning the construction of a Professional Review Report and the requirements of the Professional Review Interview.
- Member to Fellow Workshop: you local Business Development Manager will conduct a set of 30 minute surgeries to provide feedback on attendees potential for Fellowship of the Institution. *(Member to Fellow event toolkit available- e-mail regions@imeche.org to request your copy.)*

To find out more about the above activities and their compatibility with your local membership please email: regions@imeche.org

The geographical area each BDM covers is detailed on the [website](#).

1.3 (2) This is a process that will be developed throughout 2011

- In addition basic information on IMechE membership can be within the document library located within the online Volunteer Resource Centre (accessed via the Training and Development pages on the web). These could be useful tools for Committees to promote IMechE and provide a brief overview of the different types of membership.

4.2) Aim - IMechE Strategic Objective 3: Strengthen our links with Members and increase member engagement

RSB Implementation:

3.1

   1) Each Region to deliver a balanced programme of activities that includes the professional development of engineers of all membership classes.

   2) A 10% increase in the number of member attendees to regionally organised events.

   3) 5% increase in new attendees.

   (NOTE: set target at 5% based on current knowledge of regional network. Review once benchmark established)

3.2

   1) Each Region to deliver 2 events in conjunction with Divisions and Groups and/or other Institutions to address engineering issues.

3.4

   1) Increase number of volunteers in the Regional network by 10%

   (NOTE: set target at 10% based on current knowledge of regional network. Review once benchmark established)

Method:

There are a number of methods by which the Regional network can achieve all of the targets listed above.

RSB targets 3.1 and 3.2

- An event is defined as:
  a) Events organised by Regions, Areas, Young Members Panels within the Region.

b) An "Event" includes:

- Conferences	- Competitions
- Seminars	- Social Event
- Prestige Lectures	- Schools Activities
- Technical Lectures	- Careers Evenings
- Technical Visits	- Presidential visits
- Professional Development Workshops	- Annual Awards
- Professional Registration Events	- Annual Dinner

Note: Committee meetings and Annual General Meetings and Exhibitions are not included.

- The 'Promoting your local Events Toolkit' (**Appendix k**) covers the tools IMechE provides to help committees promote local events. It covers the Near You website, Mass Member e-mail (List Server) and examples of good branding. It is a simple way to remind everyone about the most effective ways of utilising the tools that already exist for them.

- A standard proforma to register event attendees is available via a link to the Events page of Near You.

- A standard event evaluation form is available on the document library located within the online Volunteer Resource Centre (accessed via the Training and Development pages on the web).

- The Central Events database is a search tool that combines ALL IMechE events being run around the world, either by HQ or the volunteer network. Regional events must be entered on Near You to be included.

- As well as being used to link your events to Division and Group activities and get a better understanding of creating 'key theme' based events the database can be used for:

  - Planning events in advance – see what events are happening on specific dates
  - Gaining new and inspiring ideas for events in your area
  - Helping get the best attendance rates possible by choosing the right event on the right day.
  - Gaining an increased understanding of what other Regions are doing and share best practice
  - Finding details of new speakers

- Meeting your committee's strategic objectives
- Helping your committee develop a more effective events programme

- Professional development activities are often delivered through the local Young Member Panels. Events on soft skills such as presentation, leadership and negotiation skills are often very popular with developing engineers. This is also an opportunity to engage all types of membership including:

  - Engeneration
  - Engineering Technician (EngTech)
  - Incorporated Engineer (IEng)
  - Chartered Engineer (CEng)

  Again, the central event database is an ideal opportunity to find speakers or get inspiration on what events meet the needs of local engineers. It is also beneficial to work with IMechE's Professional Development Training department who specialise in providing training for developing engineers. To find out more contact: cpd@imeche.org

- The Technical Strategy Board (TSB) is the Division and Group (D&G) equivalent of the RSB. Representatives sit on both boards to ensure an understanding of each others' areas and delivery targets. All Division and Group Chair contact details are provided on an annual basis. If you require a copy please e-mail regions@imeche.org

- The Strategy Advisory Committee (SAC) aims to encourage and capture member input to support Council's strategic role by providing a focus for the debate of concepts and long-term 'direction of travel' issues, and by making recommendations to Council.

- The 4 Key Themes each have a web page which clearly details each theme's strap line and campaign angle.
  www.imeche.org/knowledge/themes/introduction

  Theme managers will be attending Regional meetings throughout the year to provide an update on theme progress. In addition to this, each theme has an e-mail address so that any event proposals can easily be sent to the relevant contact for discussion.
  energy@imeche.org
  education@imeche.org
  transport@imeche.org
  environment@imeche.org

- Local Institutions provide an ideal opportunity for joint working. Contact details for the main institutions are made available annually.

RSB target 3.4

- An active member is defined as: An IMechE member who volunteers their time to deliver and contribute to the Institution's strategy.

There are numerous ways by which the regional network can engage members.

- Initiatives could include:
  - New Members evening *(Toolkit available- e-mail regions@imeche.org to request your copy.)*
  - Email shots –using the list server tool
  - 'Get involved' initiatives e.g. 'Pie and a Pint night'
  - Debate of 'what the Institution should offer members'.
  - Appoint a Regional Webmaster to improve electronic communication with members
  - Networking events

- The Ambassador scheme (www.imeche.org/ambassadors):
  - Engages and recognises all members who wish to take a more active approach to their Institution membership. Actively encouraging committee members to register at: www.imeche.org/volunteerregister will help you to recognise their efforts.

- Supports those looking to build a volunteer network. Any volunteer vacancies can be advertised to the wider membership through the website at www.imeche.org/volunteervacancies . Simply fill in the vacancy form at: https://forms.imeche.org/af/an/ambad
- All registered Ambassadors in a Region can be identified using Informer, a programme used to access Regional member data. To find out who has access to Informer in your Region please e-mail regions@imeche.org

- There are a number of communication tools to help regions communicate with members and encourage them to become active. A newsletter template is available at: www.imeche.org/brandidenity along with a number of other communication templates, such as posters and flyers.

- Engagement letter and e-mail examples are available (**Appendix j**)

4.3) Aim - IMechE Strategic Objective 4: Develop an awareness of engineering and raise the profile of IMechE

RSB Implementation:

4.1

1) Each Region to take one initiative to increase attendance of non members e.g.:
- *1 event to 1 approved college per region*
- *Region to promote 1 event to 1 stakeholder (e.g. MAS, EEF, Ch of Commerce)*
- *1 new viral advertising medium, e.g. facebook, twitter, youtube in the year each region.*

4.2

1) Increase number of non-member event attendees by 10%

(NOTE: set target at 10% based on current knowledge of regional network. Review once benchmark established)

4.4

1) 48 items of media coverage overall (to be confirmed following 2010 actual)

Method:

4.1

- The BDM's will provide a quarterly report on their activity to Regional chairs. This will include details on colleges and SME's that they have recently been working with; highlighting opportunities to link in.

- Many virtual initiatives are delivered through the Young Members Panels. Sharing of ideas and best practice is encouraged through the YM network

4.2
- Over the past few years Regions have been very strong at delivering this objective, which highlights the benefits of sharing best practice. The combined event database is again ideal for this.

- There are also a number of events that, having been piloted, have become very popular and are now being rolled out across the Regions. These include:

- Engineering Your Future (EYF): to receive a toolkit please contact education@imeche.org
- Our World in 2050: to find out more see (www.imeche.org/knowledge/themes/environment/about/2009-projects) or e-mail environment@imeche.org
- GreenPower: to find out more see (http://www.imeche.org/knowledge/themes/transport/imeche-greenpower)

- Contact details for all Regional Chairs will be distributed annually. This will enable sharing of best practice on event ideas and social media successes and lessons learnt. If you require a copy of these details please e-mail regions@imeche.org

4.4
 If your Region has a media trained representative, this person should be the main liaison between the IMechE Press Office and the media. The courses were specially designed for volunteers and covered:

    - How to write a news release
    - What is good and bad news
    - How to deal with journalists
    - Tips of how to conduct an interview
    - Understanding the role of a volunteer media officer
    - How this role links into the IMechE regional strategy

The media representative should now be able to use this knowledge and adapt it to their own programme of events linking into the IMechE Press Office. The Press Office will support and assist Media Officers in writing and developing press releases, sending information to journalists (where appropriate) and on occasion carrying out media interviews.

There are two roles volunteers can sign up for; Media Officers and Media Experts:
Media Officer: An IMechE volunteer who is actively promoting their programme of events within their region, YMP, Area or division in alignment with the vision and objectives of HQ.
Media Expert: An IMechE Member, with a thorough understanding of their chosen sector (e.g. low carbon vehicles) that is prepared to speak to the media on behalf of IMechE in support of the Institution's key messaging and vision and values.

To find out who/if you have a media officer please e-mail media@imeche.org.

If your region does not have a representative there is a one page 'Media in the Region guide' (**Appendix l**) which you can read prior to contacting the media department. There is also a tip sheet on getting photos in the media. (**Appendix m**)

You key marketing contacts are:

- For advice on public relations, media, dealing with journalists e-mail media@imeche.org
- Those interested in IMechE's political activity e-mail publicaffairs@imeche.org
- For educational marketing, career guides and posters e-mail marketing@imeche.org
- For corporate marketing material e-mail marketing@imeche.org

4.4) Aim - IMechE Strategic Objective 6: To meet exemplary standards of corporate governance**.**

RSB Implementation:
6.1
1) 100% awareness of new reporting system by Regional Committees by end Q1 2011

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2) 100% usage of system by Regional Committees by Q4

Method:

Appendix f is the template to be used by Regional Chairs to submit their Regional local action plan, reporting on progress and activity within their local area. This template is available to download from the Volunteer Resource Centre.

To help the Regional network gather information on event attendance effectively, two templates have been developed:

1) **Appendix g** is designed to help Area and Young Member Panels track the number of members and non-members attending their local events.

2) **Appendix h** is designed to help Regions collate an overview of the number of attendees to all events held in the Region.

Appendix h is to be submitted along with the local action plan update quarterly. Forms g and h are available to download from the Volunteer Resource Centre.

5. Feedback process (Jan to Dec each year)

A feedback template has been developed to make the feedback process as easy as possible, and to reduce administration time (**Appendix f**). This template enables chairs to gather all local actions that are being carried out by the Regional, Area and Young Member committees that contribute to the RSB targets. Once the progress of all local actions has been collated a Regional network overview of progress against the RSB targets will be published to RSB.

Chairs are asked to submit their local action plan on a quarterly basis. See (**Appendix i**) for the Regional budgeting and reporting timeline. The Regional overview of event attendance (**Appendix h**) is to be submitted at the same time as a supporting document.

The Institution has become more business focussed in recent years and there is a requirement for us all to report on a regular basis in order that the Trustee Board can assess and co-ordinate a view on the performance of the Institution. It also makes good business sense to report regularly providing the Regional Strategy Board with valuable information on trends in order to develop achievable and effective forward strategies.

6. HQ support

HQ support is available to help throughout this process. A summary of the Regional and International team and each team member's role is available at:

http://nearyou.imeche.org/support

Guidance and support tools are continually being developed and enhanced to support you in your roles including:

- Communication with local members
- Committee members and their roles
- Sharing of best practice
- Financial budgeting and reporting.

To view the latest support and guidance material please visit the Volunteer Resource Centre accessed via the Training and Development pages on the web. For further information contact regions@imeche.org

7. Regional Funding

Funding is available from HQ for regional activities included the local action plans. There is an annual budgeting and reporting cycle for the Regions from January to December each year **(Appendix i).** For further information contact regions@imeche.org.

The annual budgeting, local action planning and reporting process all go hand in hand.

- The Regional strategy is developed at the RSB Strategy Planning meeting in January/February of each year and fine tuned for approval in May.
- Templates and guidance for budgeting for the forthcoming year is distributed from HQ in July, requesting input by mid September. The budget template and process includes provision for coordination with the Regional strategy and it is important that financial and strategic considerations are made to ensure that that the processes are complementary.
- All Regions will be required to report on a quarterly basis. The planning information that is provided as part of the budget submission by Regions on strategic activities constitutes the content for quarterly reporting throughout the year. There is no requirement to provide information on spend via quarterly strategic reporting.

8. Appendices

a) Board Structure & Directorate / Departmental Relationships

b) IMechE Strategy

c) RSB Terms of Reference

d) RSB Strategy

e) RSB Strategy Overview PowerPoint

f) Local action plan template

g) Area event attendance sheet

h) Event attendance – Regional overview

i) Regional Budgeting and Reporting Timeline

j) Examples of member engagement

k) Event toolkit

l) Media guidelines

m) Getting photos in the media