

## **Regional Strategy Board**

Minutes – 5 February 2013

### **1. Introduction**

Terry welcomed everyone to the meeting. TS made it clear this meeting was a special meeting. The minutes of the last meeting and other RSB matters would be covered in April.

#### **1.1 Attendance list**

Terry Spall – TS – RSB Chairman  
Phil Baker – PB – Merseyside and North Wales  
John Butler – JB – Midlands  
David Ball – DB - North West  
Simon Edwards – SE – Thameswey  
Phil Hilton – PH –Yorkshire  
Stewart Kerr- SK – Northern Ireland  
Ian Campbell – IC – East Midlands  
Sylvain Jamais – SJ – Eastern  
Robert Owen – RO – South Wales  
Chris Durden – CD – Scotland  
Jon Gray – JG – North East  
Ian Parsons – IP – Western  
Nick Schulkins – NS – Wessex  
Khosru Rahman – KR – South East  
Richard Folkson – RF – Eastern

#### **Staff**

Bruce McGill – BM – Marketing  
Michelle Wheeler – MW – Marketing  
Colin Brown – CB – Director of Engineering  
Hazel Morgan – HM – Member Engagement  
Kevin Manning – KM – Member Engagement

**1.2** Apologies for absence: Ken Huntingdon (GLR), Robert Simpson (ROI)

### **2. Definition of meeting and purpose**

TS explained that the outcomes of this meeting would be proposed to Trustee Board so it was hoped suitable conclusions could be made.

TS reported his own experience of receiving the newsletter in the Midland region. He attended an event not in his area (which would not have been seen via individual event emails). TS then looked at how each attendee found out about the event:

25 newsletter, 35 Near You, 23 programme card, 7 social media, 50 other (non members).

Considering roughly 50% of the attendees were non-members, this does show a significantly better uptake of the Newsletter, compared with the reported results in November of between 5-10% discovering the event via the Newsletter. So it is growing as a way members find out about events.

Newsletter positives: professional, efficient and concise and utilises the new 'iCal' option well.

Negatives: Could argue that for some large Regions there is too much content - maybe delete the summary of the following month's events and just have a Near You link

Localism: Issue under the name of the Regional and D&G Centre Chairs (where one exists in a Region) possibly with 'mug' shots.

Make news just local items and not repeat Institution wide notices that appear elsewhere.

Properly branded follow up emails - could be standard or where appropriate bespoke responses.

TS urged the group to recognise there is a problem with email and yet he was very aware that regions are asked to increase attendance at their events every year.

### **3. Review of existing situation and outline of solution.**

BM presented to the group. Email is a very important mechanism for IMechE and all departments rely on email to promote what they are doing. IMechE is becoming aware that emails need to be carefully managed as too many emails result in members unsubscribing to all communications.

BM welcomed the use of other channels for promotion such as programme cards, Near You and social media.

A good example is the events calendar that was launched in the January Agenda and has already had 5000 downloads, proving an advance list of events is in demand. [www.imeche.org/news/archives/13-01-30/Your\\_calendar\\_of\\_headline\\_events\\_for\\_2013.aspx?WT.mc\\_id=HP\\_130057](http://www.imeche.org/news/archives/13-01-30/Your_calendar_of_headline_events_for_2013.aspx?WT.mc_id=HP_130057)

Regions need a strategy for communications that are owned by them. Regions know how their areas work.

BM showed the RSB some example profiles of what members may receive in a year. Some members receive 71 per year, others 141. BM's presentation can be downloaded from the VRC <http://nearyou.imeche.org/volunteer-resource-centre/strategy/regional-strategy-board>

PB asked how many emails are considered reasonable in a week. BM reported that members in the survey have asked for one email per week and IMechE currently sends up to three. CD asked if it is the regions are over sending emails? Inboxes are full of HQ emails not those of the regions. BM stated that members can easily unsubscribe from third party emails and industries that are not relevant. MW stated it is only in certain regions/areas where emails are over sent. The amount of emails sent by committees has been tracked since April 2011. Examples include one area that sent six in one month; other areas stick to two per event.

DB asked if three emails a week is acceptable when 141 is within the current guidelines. BM stated this is the top of the toleration level and all parts of IMechE are reducing emails and regions should be part of this as well.

IC asked if there was research on when it was best to receive emails. Are weekend emails good so members can read them at home? BM responded that it can work but it depends on what email address the member has given IMechE. Some use work, some home. It was noted some areas do send emails on weekends.

RF asked how the recency filter worked. BM stated that the only emails that ever get blocked via the filter were single HQ event emails arranged by the Divisions and Groups.

The RSB was then split into three groups to discuss:

- Utilising what has been learnt so far through trial and research
- What is the right mix of communication tactics?
- How do we make the most of Near You?
- How do we make the most appropriate use of email?
- Output = Proposal for Trustee Board to consider

#### **4. Feedback from breakout groups**

##### **Group 1**

- Current newsletter has seen drop in event numbers but increase in use of Near You.
- Midland is a very long newsletter, would be better if it could be split by area?
- Newsletter could be sent via postcode not area.
- For the areas over-sending emails, guidelines should be produced so they understand what is acceptable.

- Needs to be a better explanation of 'iCal'
- Regions and areas MUST still have access to the list server but limit emails to two per event/2 per month.
- Near You should be able to be converted into a printable programme card
- Local news should be on the newsletter not HQ stories

## **Group 2**

- Sophistication of email system needs improvement: more relevance
- More/better targeting eg ability to send emails to specific grades or by location
- Newsletters split by area not date
- Flexibility in newsletter design/templates to reflect local need
- Automatic reminders from the 'register your interest' button
- My Account to enable members to receive notifications from more than one region
- My Account to include expected frequency of each type of email (cf LinkedIn)
- Programme cards (some regions send via PE) still very useful, also working with other institutions to promote events jointly
- Near You functionality must improve re downloading details of members who register to attend events
- Must retain access to the list server to send reminders (agreed this could be monitored/used sparingly)

## **Group 3**

- Must retain option to send event reminders as this improves attendance at events
- Likes the professional look of the digest (small minority not bothered how it looks)
- Introduce best practice for sending emails (for those who don't want digest)
- Use template similar to digest for those Regions who would still like to retain the ability to send own emails

- Near You event registration must be more sophisticated (enhancements planned for Q2)
- Online booking system to have the facility to print a ticket for events, similar to Ticketmaster
- Online booking system to have the facility to book tickets for multiple guests
- Near You events to have feedback option (enhancements planned for Q2)
- Event reminders sent automatically via iCal
- Near You must be used by ALL Regions/Areas/YMP to advertise events
- Event contacts must have imechenetwork email addresses. Personal email addresses look unprofessional
- A regional newsletter just won't work for some Regions with a diverse geographical structure. Need to consider an Area digest instead
- iCal very useful but need to have an (OnMouseOver) explanation on what it does / how to use it
- Improve iCal functionality so it is similar to an Outlook meeting / Facebook event request (have the option to choose whether attending, tentative or not attending)
- The ability to send mass mailings to non-IMEchE members who have registered interest in receiving such communications
- Allow users to search for events within a mileage radius of a specific postcode, as per Job Search websites (enhancements planned for Q2)
- Ability to choose to receive mailings from more than one Area via My Account (this received 5621 responses via the digital user survey from people who thought this would be "somewhat useful")

## **5. Resolution on way forward**

*James Hobbs (JH) joined the meeting.*

TS thanked everyone for taking part in the meeting and recorded the main points to be reported to the Trustees.

1. Newsletters will be optional - HQ will not force the newsletter on a region if it is not wanted, however it is encouraged!
2. Flexible frequency for the newsletter: monthly or quarterly. The newsletter will still sit within the schedule used at the moment (usually the week before last week of the month) No HQ items to be included, but Regional news will be included when there is some.

3. We will try and group the content on the newsletter by Area, not date. Postcode functionality is on the wish list as it currently not possible on the system, but it has been noted.
4. Email guidelines to be prepared recommending a guideline maximum of two emails per event but accepts intelligent application of this guideline will need to be used in case of event cancellations etc. We will review the guideline in a year's time when hopefully, the Newsletter has become more established. Areas not adhering to the guidelines will be challenged and consideration given their particular circumstances that are preventing compliance. (To clarify, two emails are in addition to the newsletter.)
5. Enhance iCal – especially in how it can be used to automatically generate Outlook reminders to those registered.
6. Regional Information Coordinator role to be created in each region to support the Newsletter process. A role description will be produced and circulated to all Regions. JH asked if the Coordinator could also co-ordinate Social Media feeds for regions. RSB agreed.
7. Need for email responses to event bookings and all associated communications to come from a properly branded email account and not personal emails.
8. Agreed that HQ will create a template that can be used to gather post event feedback and other useful information such as future event ideas.
9. Agreed that we have a proper launch of the Newsletter initiative to all members so everyone is aware of their existence, their purpose and also the benefits they can offer.

PB asked if there was a way via the list server, to target just Members (for Fellow workshops) or just EngTechs? BM asked for any requests to come to HQ as it can be done centrally.

The Marketing and Member Engagement teams will take on board all the actions and feedback at the next meeting – a plan of implementation to be presented in April.

A report will be made to the next Trustee Meeting based on the outcome of this meeting.

## **6. Any other business**

- Next meeting will be at the Advanced Manufacturing Research Centre in Rotherham on April 9.
- Nominations for the Stephenson Award should be made by 1 March.