

Role description - Regional Director, Corporate Relations Operations and Insights

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The Operations and Insights Regional Director is responsible for the overall organization, administration, and reporting for the Corporate Relations department and uses data, insights, and trends to recommend and inform department strategic planning and committee focus. Reports to the regional Corporate Relations Center of Excellence President.

Operations and Insights Regional Director role responsibilities

Leadership and strategic planning:

The Operations and Insights RD is a regional CR department leadership member, reporting directly to the CR department president. Helps to shape the overall corporate relations strategy within the region, often working with the Programming department and Market Research teams to inform planning/decision-making.

Functional responsibilities: the regional director is responsible for oversight of two areas:

- **Operations:** organization, administration, and reporting
 - Maintenance of regional CR committee lists/record keeping and repository of regional best practices/training/SOPs
 - Ensure all CR team members have up-to-date CR tools/resources; check materials/agreements for accuracy and consistency
 - Builds and maintains CRM of regional company data and ensures proper reporting
 - Tracking of sponsorships and company participation, KPIs/goals, and other metrics
 - Manage department calendar, meeting organization, and agenda creation
 - Coordination and meeting participation as needed with the programming department to understand sponsorship needs and align planning
- **Insights:** using data, insights, and trends to recommend and inform department strategic planning and committee focus
 - Liaison to Market Research (MR) RD and committees*, requesting research and data analysis to make better-informed decisions/find trends to support the region's needs. Examples include but are not limited to:
 - Research company/market data for business development and prioritize committee focus
 - Analysis of existing customer and other data to find trends
 - Provide HBA Central CP survey results for relevant insights into companies and segments
 - Conduct additional targeted or ad hoc research as needed to support regional strategy
 - Work cross-functionally within the region (with engagement, marketing/communications, programming, and chapters as needed) to pull together relevant data, insights, and trends in those areas to inform CR planning
 - Use and share insights gleaned to provide suggestions, improvements, or inform strategic planning and focus

**Note: this individual/team is not responsible for doing the data/trend analysis themselves (which is a function of MR), but instead liaises with MR in requesting needs for the department*

Committee management:

This regional director may engage one committee chair to lead every two functional areas (one for Operations, one for Insights). These committee chairs can engage and lead a committee under them to assist in handling responsibilities. The RD is responsible for overseeing these chairs/committees and to ensure:

- committee members have appropriate training and access to materials, tools and resources
- prompt delivery on expectations
- proactive succession planning
- alignment of committee planning, goals/activities with other regional/chapter committees

Time requirements

Regional leaders spend time a) managing their designated committees, b) participating on their designated leadership team (e.g. Center of Excellence), and c) interacting with other leaders in the same role across the association.

Roles generally require about 10 hours per month. Estimated activities are as follows:

- 4-8 hrs per month managing their committees: setting and reviewing plans and progress, coaching leaders, ensuring volunteers are trained and ready for their role
 - 2 hrs per month in Board or department leader meetings: sharing and coordinating plans and progress; longer-term planning and budgeting
 - 1-2 hrs per month interacting with their role peer group: sharing innovations, discussing new policies and best practices
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