



BASIC CHAPTER PLANNING

**A Guide for Developing
a Successful Chapter Plan**

TABLE OF CONTENTS

Section One	Introduction to Planning
Section Two	Organize to Plan
Section Three	Six Steps of Planning
Section Four	Step-by-Step Chapter Planning
Section Five	Sample Chapter Plan of Action

SECTION ONE—Introduction to Planning

Planning is the basis for a successful year. It is only through planning that events and activities happen on purpose, rather than by accident.

In planning, you take time to think and analyze, to consider alternatives, to decide the objective, set goals, and develop methods. You decide in advance where to go, why to go there, how to get there, and what you need to get there.

Importance of Planning

If we know where we are going, we are much more likely to get there and others working with us will be much more effective and interested. It is vital in Jaycee planning to bring the members into the planning process. Each member will not only feel the plan is partially his or hers and will work for the plan, but each person will also know how he or she fits into the action.

Functions of Planning

A certain logical process must be followed to plan properly. The approach outlined in this manual is not the only planning process that could be used, but has been found to be successful for Jaycee chapters.

The most important determination to be made is the objective of the chapter. This must be accomplished before the specific planning steps can be started. There are various objectives adopted by chapters. Some of these are: best service organization in town, best networking organization in town, best business organization in town, or best leadership development organization in town.

Unless a chapter clearly defines its objective, the leadership and the membership will find themselves going in several different directions. Problems will be encountered when decisions have to be made on the allocation of resources.

After a clearly defined objective has been agreed upon, the chapter is ready to apply the six steps of good sound planning.

1. Identify problems and needs
2. Establish priorities
3. Set a specific and identifiable goal for each priority
4. Select the best projects or methods to achieve each goal
5. Monitor and evaluate priorities, goals, and projects or methods on a regular basis
6. Evaluate annual progress

The following sections contain general planning principles as well as a step-by-step guide to creating a Chapter Plan along with a sample Chapter Plan for your use. Do not feel that your chapter's Plan of Action must mirror anything in this guide; branch off wherever necessary so that your Chapter Plan reflects the individual wants and needs of your members and your community.

SECTION TWO—Organize to Plan

Planning does not just happen. It is the responsibility of the chapter leaders to organize to achieve the best possible results of the planning effort and time.

An integrated structure of planning must be developed for the entire chapter. This requires that each officer and the interested members do the planning work that they are most interested in and can perform best. The planning work done by any one group should not duplicate or unnecessarily overlap the planning work done by any other group.

Planning sessions should be conducted for the different aspects of your chapter. Each of these following four groups should be headed by that Area's Vice President or Director.

Group One should plan for the chapter's Individual Development Area of Opportunity programs.

Group Two should plan for the chapter's Community Area of Opportunity programs.

Group Three should plan for the chapter's Business Area of Opportunity programs.

Group Four should plan for the chapter's International Area of Opportunity programs.

A fifth group involving the chapter officers should plan for the chapter's Management Area of Opportunity, which involves the above four other areas as well as the membership plan for the year. It will be the responsibility of the chapter officers to coordinate all Areas of the chapter plan in order to best achieve the objective of the chapter.

The Management Area is a complex area that includes many different sub-sections. It may be best to have several sub-committees in charge of each of the different areas. Management functions are: planning, training, financial management, personnel management, membership, and communications. Even though these functions are interrelated and dependent on each other, narrow the identification process through multiple committees in this area in order to cover all functions in depth.

Several tips to achieve best results from each planning session are:

1. The planning groups should be given the authority to plan for their respective Areas.
2. The greater the participation by the members in the planning process, the more involved the members will be in executing their plans. Utilize surveys of the membership, asking each member to list three to five things they would like to see done or want to do.
3. Many former chapter officers or, if a new Jaycee chapter, chapter officers from other nearby chapters, should be consulted in order to take best advantage of long-term experience.
4. Be sure to provide ample time for planning.

SECTION THREE—Six Steps of Planning

Step One—Identify Problems or Needs

The planning process, after defining the chapter objective, must next start with identifying the self-improvement needs of the members; the problems existing in the community the chapter can, and wants to, address; and the chapter's management systems and procedures.

The key questions to ask as each problem or need is uncovered are: Why is this a problem? What are the underlying causes of the problem?

For example, if chapter members are not actively attending membership meetings or chapter projects, don't focus on simply trying to get more involvement. Instead, look at the way membership meetings are run or at the type of chapter project. The cause of low attendance and participation may be that meetings do not meet the needs of the members and chapter projects are not the projects members want to be running.

Tips and Cautions:

1. Be sure to identify the underlying causes of problems.
2. Evaluate responses for true meanings and be willing to accept what is learned.
3. Don't allow problem identification to consume all your time. When a realistic idea of problems, needs, and weaknesses has been identified, move on to establishing priorities.
4. Always be alert to additional data or changing conditions.
5. Be sure to keep adequate records of procedures used in identification. These records will be extremely valuable when you need to look at problems or needs again.

Step Two—Establish Priorities

When the various needs of the members, the community problems, and chapter management weaknesses have been identified, it becomes time to establish priorities for an orderly plan of attack.

Which has the most urgent need for a solution? Which will have the greatest impact on the community or chapter? Are there other groups, agencies, or organizations now attacking the problem or planning to do so in the near future? Should a joint effort be made?

Three important factors must be considered as the priorities are set: manpower, finances, and interest.

Manpower refers not only to Jaycee members but also to others in the community interested in solving the problem and willing to work for its solution.

Most efforts require some amount of money and, therefore, the financial needs and resources must be considered. Again, this does not mean only the bank balance the chapter has or the income expected from planned ways and means (or fundraising) projects. Outside financial resources or the possibility of outside funding should be considered.

The most important single factor to consider is the desire and interest of the members in attacking the various problems or meeting the many needs of the chapter. If the desire and interest of the members exist and they are willing to make a commitment to work, almost anything can be accomplished. But as serious as the problem may be to the community, if there is no interest by the members, it is a waste of time to select it as a priority.

Step Three—Set a Specific and Identifiable Goal for Each Priority

With priorities established, it is necessary to set a goal for each priority. What do you want to achieve in relation to each priority? What will be the standard of measurement?

It is in this step of goal setting that most people have difficulties. Unless a goal is specific, identifiable, and measurable, it is not a goal.

- A. Goals are a statement of what you want to accomplish.
- B. Goals should be personal. The more the members participate in setting goals, the more likely they are to become totally involved in reaching those goals.
- C. Goals must be realistic. Goals should be high enough to be challenging, but not so high the members feel they are impossible to accomplish. The members are the best ones to say which goals they feel are too high or too low.
- D. Goals must reflect progress. Many of the priorities selected obviously cannot be solved completely within a year. Chapters should set both short-range and long-range goals.

To achieve long-range goals, steps or sub-goals must be set to lead to the accomplishment of the long-range goal. Deadlines for each step should be established, thus a reasonable timetable for the overall accomplishment of the goal is developed.

- E. Goals must be written, specific, and identifiable.

By writing down the goals for the year, several things happen. The act of writing it down crystallizes thought and thought can motivate action. We can see what we want to accomplish and thus are less likely to allow distraction or obstacles to prevent us from achieving goals.

“We are going to solve the drug problem in our community,” is not a specific goal.

“We will sign up 25 new members by June 1.” “We will treat 100 people in our drug treatment clinic each month.” These are specific goals.

- F. Goals must be measurable. If no standard of measurement is set, you will never know if you are accomplishing anything.

Step Four—Select the Best Projects or Method to Achieve Each Goal

When the goal has been established, it becomes necessary to prepare a plan for reaching that goal. This plan will consist of a project or series of projects designed to move you toward the accomplishment of the goal.

Several alternatives for projects are usually available. Through study and planning, the best method should be selected. On occasion, the complexity or scope of the problem may require that more than one project be conducted. Each project will be related to the other and combined will lead to the specific goal. For example, one project may be conducted to raise funds for the purchase of land, another to rezone the land, and a third to design and construct the playground. Each of these projects is related to the goal of providing playground facilities for 200 children.

Discuss and explore as many possible alternatives as come to mind. Use your creative thinking and don't fall into the trap of doing something just because that is the way it has always been done. Examine your current projects and methods to determine if they can be modified to reach the goal. Even though you should not accept prior methods as the right way today, it is also not necessary to reinvent the wheel each year.

As projects and methods are decided upon, resources must be allocated to each. The basic resources available are money, materials, and the time and talent of people. Consider both the resources available in the community as well as those within the chapter.

At this stage, each Committee Chairperson should use the Chairman's Planning Guide (CPG) to develop and plan the selected projects. Be sure each Chairperson knows how the project relates to the objective of the chapter and the goal for the priority area in which his or her project falls. Stress the importance of the role he or she plays in the entire chapter team.

Time your projects. You cannot, in most cases, attack all of your selected priorities with maximum effort at the same time. Spread the effort out to avoid major peaks and valleys during the year. You should also plan projects with the goal of Public Relations. For example, planning a Breast Cancer Fundraising Drive during breast cancer awareness month. Your PR will significantly improve through tying it in with other groups and causes.

Step Five—Monitor and Reevaluate Priorities, Goals, and Projects or Methods

If your chapter has the same experience as many other chapters, the members having had the opportunity to participate in the overall planning will be very involved in implementing and executing the plans. It becomes the responsibility of the Board to constantly monitor the progress being made. Without this monitoring of the implementation, it becomes easy to lose sight of the chapter's objective, the priorities, or goals.

This monitoring process will make planning an ongoing function, which it should be. In addition to the continuous monitoring of the implementation, a reevaluation should be scheduled about mid-year. Schedule the reevaluation on your chapter's calendar of activities now.

Reevaluation should follow the initial four steps leading to the plan. Usually this reevaluation can be quick and brief using checkpoints from the original study. Ideally, the same people involved in the original process should participate in their respective areas for reevaluation. Be sure to review priorities, goals, and projects.

Never hesitate to drop a priority and replace it with another if it will better meet the objective of your chapter.

It is not contrary to proper planning to reset goals as progress is reviewed. Goals may have to be modified—raised or lowered—to properly reflect the progress to date.

Most Jaycee chapters consider it against an unwritten rule to drop a project currently underway. If there is not enough reason to continue it or if it is no longer relevant to your chapter's objective and leading to the achievement of a predetermined goal—drop it! It is the realization of your chapter objective that determines your chapter's success and not the mere completion of a project.

BUT, don't use the reevaluation planning session as a cop-out. Take a realistic look at each of the prior four steps and determine if some changes or modifications are necessary, but don't change for the sake of change.

Step Six—Evaluate Annual Progress

In the planning process goals were established for each priority that were specific, identifiable, and measurable. It is the measurable aspect of the goal that enables you to evaluate progress to date.

As each project is completed, each goal achieved, and each priority resolved, a final progress report should be prepared. This final report should be prepared at the completion of the various phases.

At the close of each Jaycee year, the officers and members should evaluate the chapter's total performance to determine their progress. Accomplishments for the year should be included in the progress report. Also include in the report a current analysis of the needs

of the members, the problems of the community, and the weaknesses of the chapter's management systems and procedures.

Through this evaluation and the resulting written report, a foundation is provided for next year. Those who follow will have the benefit of your experience. By evaluating what happened, you will learn and gain through the analysis of both successes and failures.

SECTION FOUR—Step-by-Step Chapter Planning

The Chapter Plan is the only project that should be chaired by the President, and the President should oversee all aspects of the Chapter Plan.

The involvement of other chapter officers and members is vital to the success of the Plan. The Vice Presidents, Treasurer, Secretary, Directors, and other officers should take responsibility for each phase of the Plan, with the members' input. The completed Plan should be presented to the entire membership for approval. First determine your chapter's objective, then complete the following components.

The components of the Chapter Plan are:

1. A member survey
2. A community needs analysis (survey)
3. A planning session
4. A written Chapter Plan draft
5. A calendar of events
6. An organizational chart
7. An annual budget
8. An annual membership plan

Member Surveys

One officer of the chapter should be selected to supervise the member survey. The survey could also be run as a project with a member in charge of a survey committee.

If conducted properly, the member survey should tell the officers what the members are really looking for in the chapter and provide valuable information such as why members joined the chapter, what types of projects interest them the most, and whether or not they are interested in chairing a project.

The member survey can be conducted in a variety of ways, such as:

- ❑ Surveys can be mailed to the membership through the chapter newsletter, with instructions on how and when to return them.
- ❑ Surveys can be conducted at membership meetings.
- ❑ Surveys can be conducted by telephone through an organized calling committee.
- ❑ Surveys can be conducted by paying visits to members, which is a particularly good option for a smaller chapter.

The chapter should contact as many members as possible to ensure the validity of the survey. If members see that someone has taken the time to ask for their opinions, they are more likely to get involved.

Community Needs Analysis

The Community Development Vice President should conduct a survey in the community. This survey should be designed to determine community needs and can also be run as a project with a member in charge of a survey committee.

The basic framework for a community survey is easy. Think of a few simple questions you want to ask people in your community about your chapter's current and future activities. Then get permission to solicit responses from people at some well-trafficked place like the entrance to a mall or a popular local grocery store. Buy a gift certificate or gift worth \$25 or more and use it as a raffle prize for completing your questionnaire. With a small crew of surveyors you can collect hundreds of responses in just a few hours.

Keep the questions simple. A survey designed to ask two questions is best. The first question is "What do you think of the following Jaycee projects that we run in this community?" The question is followed by a list of projects and a scale to rate their importance. This gives you feedback on current programs. The second question is "How well are the needs listed below being met in our community?" A list of program areas follows with another scale to rate them. It's a simple questionnaire to fill out, and it will give you a lot of information.

There are many ways to benefit from the results of the survey. First, it gives you feedback about the relevance of your current programs as well as ideas for new ones. Secondly, you should be able to use the survey results to get help for your chapter. If you would like donations from businesses or support from a local unit of government, use the data you collect to demonstrate that your project is important and meets a community need. Thirdly, use the survey process to locate prospective members. You will need to get names and addresses to give out your raffle prize. Ask people to place themselves in an age range (i.e. 18-21, 21-25, etc.). That plus their responses should give you a good pre-qualified list of potential members. Finally, think seriously about putting together a press release to describe your survey, its purpose, and your results. It's a good way to improve your public relations.

Do a serious survey effort at the beginning of the year. Present the results to your membership early, so they can make informed decisions when filling out their membership survey. Then use all of that data in your Chapter Plan.

But, doing surveys throughout the year at projects is also a good idea. Conduct a survey and raffle at your Easter Egg Hunt, your Punt, Pass, and Kick tournament, and any other project where people from the community gather. The feedback will be helpful, and you will generate lists of prospective members throughout the year.

Many segments of the community should be targeted. It is important to get feedback from elected officials such as the Mayor, city council members, police chief, sheriff's department, or other elected local and state representatives.

Input from the school superintendent, local churches, nonprofit agencies such as United Way, the Chamber of Commerce, and business leaders is valuable as well. Other civic groups and the local media can also help target community needs.

The survey to these special groups can be conducted in the following ways:

- ❑ A personalized letter containing a survey and mailing instructions. It's best to provide a postage-paid, self-addressed envelope for returning the survey.
- ❑ A phone call.
- ❑ Meetings with various members of the community can help you gather the input needed to develop the plan for the year.

The Planning Session

Once information has been gathered from chapter members and the community, a planning session should be conducted with the chapter officers and a few of the members. The information should be reviewed to determine what types of projects the chapter will be running for the year.

Prior to the planning session, each officer responsible for an area of chapter programming should review the information from the surveys to come up with a plan for his or her area.

During the planning session, the group should discuss the strengths of the chapter and potential roadblocks to success. Remember, the Chapter Plan should maintain strengths and strengthen weaknesses as well as adhering to the chapter's overall objective.

Once the survey results have been compiled and reviewed, the group can set about the task of completing the Chapter Plan of Action. This should include goals for each Area of Opportunity (Individual, Community, International, Business, Management), a list of projects for each Area of Opportunity, a calendar of events, and a proposed budget for the year. The membership plan for the year should be developed at this time, too. Determine how many members will be needed in the chapter to implement the plan and to replace members who do not renew their membership.

When the Plan has been completed, it should be published for member review. The membership should also vote on the Chapter Plan. Involving the members in the planning process allows them to be more committed, feel ownership in the Plan, and ensures member participation.

Components of the Chapter Plan

A good Plan of Action is the basic means by which a Jaycee chapter is able to fulfill its objectives. The Chapter Plan is a step-by-step blueprint to help the chapter identify its needs and desires for the coming year.

The following steps are essential:

1. Determine the Chapter's overall objective—the primary reason for which the chapter exists.

The resulting mission statement should answer the question, "Why do we exist?" It should provide, in a nutshell, the reason the chapter is providing the programming outlined in the Plan. A sample objective statement could read "To identify and develop the leadership skills of each member through the Individual

Area of Opportunity and enhance these skills through activities in the community and through management of the chapter.”

Defining the chapter’s reason for existence in simple terms will ensure that all members and officers are working together toward a common goal.

2. Compile the results of the member and community surveys.

As succinctly as possible, list what has been discovered in terms of member and community needs. This will provide the chapter with a focus for programming for the year.

3. Briefly list the strengths of the chapter and what has been determined to be potential problems for the chapter.

Being aware of the chapter’s strengths and weaknesses will help develop effective programming for the membership and the community.

4. Set realistic goals for the year.

Look at the surveys and determine how many people in the community the chapter wants to impact, how many of the members the chapter wants to impact, how much money it wants to raise, how many members need to be recruited, and so on.

Don’t set the goals so high that they are unattainable, but also, don’t set goals so low that they are too easy to reach. Challenge the chapter by setting goals that are aggressive, yet attainable with effort.

When setting goals, consider the short term (this year), as well as the long term (three to five years). What direction does the chapter need to go in the future and what can be done now to ensure it gets there? It is helpful for a chapter to develop a separate long-range plan.

After the goals have been set, determine which officer or officers will be responsible for attaining these goals. This is where an organizational chart will be helpful.

Each officer should have set responsibilities and be accountable for specific goals. By spreading the responsibility around, the chapter will be more likely to succeed, even if some of the officers are non-performers.

5. Divide the Chapter Plan by Area of Opportunity.

Areas of Opportunity are categories that Junior Chamber activities are broken down into. They consist of Individual, Business, International, Community, and

Management. Areas of Opportunity are defined in the National Awards Manual, which can be found on the national web site at www.usjaycees.org/awardsmanual.htm.

Identify strengths and weaknesses, and begin to set goals by Area of Opportunity. This will help make the Plan more manageable, and will be an easy way to divide responsibility to each of the officers.

Identify those projects that best accomplish the chapter's goals and main objective. Rank within each Area of Opportunity the projects in order of more likely to contribute to the main objective.

Calendar of Events

Once the chapter's goals have been defined and the projects that meet those goals have been identified, a calendar of events should be developed.

Projects should be timely. For example, make sure that the 4th of July Parade is held on July 4. The calendar should be used to determine when the Chairperson should be starting work on a particular project. An example is that to ensure the success of the Christmas projects, depending on their size, the planning should begin in August or September, not December 1st.

Organizational Chart

An organizational chart is important to ensure that members and the Board understand where they fit in the scheme of things. This can be as simple as preparing a brief job description for each officer or a tree graph showing the interrelationships between each officer and the members. No matter how this information is displayed, it's a helpful tool that can be used to help members understand how the chapter works.

Annual Budget

Money is needed to effectively run the chapter; therefore, a way to manage that money is necessary. After determining what projects will be run, the chapter officers should review each project and determine how much funding will be needed.

The Treasurer is an asset to any chapter; however, each and every Board member as well as every chapter member must commit to fiscal responsibility. A Finance Committee should be appointed to help the Treasurer and lend support for financial decisions.

In addition, each Board member can help the Treasurer in the following ways:

- Review monthly financial statements in detail at each Board meeting and have the chapter budget available at the membership meetings.
- Review all accounts receivable (money owed to the chapter) and all accounts payable (money owed by the chapter) at each Board meeting. Accounts Receivable would include membership dues and things such as payment for ads run by local businesses in the chapter's newsletter. Accounts Payable would include facility rental, chapter newsletter printing costs, etc.

- ❑ Ensure that each committee Chairperson is made aware of their project financial responsibility.
- ❑ Draw up and review cash flow projections. Make sure the Board knows when there will be money and when times might be lean.
- ❑ Initiate financial controls such as check request forms for reimbursement of project expenses. Make sure that appropriate documentation such as receipts are turned in before reimbursement takes place.
- ❑ Actively participate in all fundraising projects.

The budget serves as the basis for all chapter operations. As the chapter's budget is developed, the following should be considered:

- ❑ Don't count on an increase in membership to increase revenue. As a rule of thumb, use year-end membership figures as a basis for dues income. If an increase in membership occurs, evaluate the budget at mid-year and reallocate funds accordingly.
- ❑ Realistically determine how much money the ways and means (fundraising) projects will raise. It is best to be conservative. A good rule of thumb is to use last year's totals as a basis for the new year.
- ❑ Remember, each chapter has administrative expenses such as postage, state and national dues, stationery, telephone, insurance, incentives, etc., that need to be included in the budget. A good idea, also, is to budget for unexpected expenses that occur by having some sort of contingency fund.

The Membership Plan

Every chapter needs members to run projects and planning in membership throughout the year is critical. Every year, chapters naturally lose members due to life changes. People move, get promoted, lose their jobs, get married, have children, etc., and for whatever reason do not renew their membership. Chapter officers should be prepared for this.

As members are lost to natural attrition, they must be replaced with new members in order to keep the chapter viable. Each month, a number of members will be "due," that is, up for renewal of their membership.

These numbers should be plotted on a chart, so that each month, membership needs are known. The number of members expected to drop each month, if any, should be calculated. Figure out how many members are expected to drop each month, and how many new members will be needed to replace those lost. Once the membership plan has been completed, membership and other chapter programming can be planned accordingly.

Evaluating the Chapter Plan

An effective Chapter Plan is one that evolves throughout the year to meet the changing needs of the members and the community. On a periodic basis (quarterly is the best), the Board should review what has been accomplished to date and what needs to be accomplished by the end of the year to meet the goals set at the beginning of the year.

Surveying the membership throughout the year is a good idea to see if members are still happy with the programming. Survey each new member as he or she comes in so that their input can be incorporated into the Plan.

Reviewing the progress made in meeting chapter goals is also important. If the chapter is not meeting a goal in a particular area, the group should note whether or not the program has run yet (according to the calendar of events). The projects that have run should be evaluated to determine whether they were successful or fell short of expectations.

In either case, determine the reason and take corrective action if necessary. The chapter should not hesitate to revise a goal during the year if circumstances warrant it.

The budget should be evaluated at the same time the goals are evaluated. Is the chapter raising as much money as estimated at the beginning of the year? Will there be a surplus, or will there need to be some belt tightening?

The Annual Report

One final evaluation of the Chapter Plan should occur at the end of the year. This ties the year together and leaves a foundation on which next year's Board can build.

A close look at the success or failure of the projects, how well the chapter goals were met overall, how much money was earned and spent, and how many members joined and renewed will show the Board and the membership just what was accomplished during the year and leave a record for future chapter planning.

The following items should be included in the Annual Report:

- ❑ A summary and evaluation from the President and the other officers. This is a written summary of how well each programming area did throughout the year. This can be one paragraph or several pages.
- ❑ A year-end financial statement answering the question, "Was the chapter financially successful?"
- ❑ The complete Plan of Action from the beginning of the year and the periodic evaluations. If any goals were revised during the year, they should be listed along with the reason for the action.
- ❑ A Final Report of activities and year-end result of goals. Was the chapter successful? Why or why not? How many people did the chapter impact and how was this determined? Did the chapter meet its goals?
- ❑ A list of any problems that occurred during the year and the solutions developed to overcome these problems. Problems happen, and keeping track of them can help to ensure that they don't happen again in the future.
- ❑ A list of the chapter's revised strengths and weaknesses. Remember, at the beginning of the year, programming was developed to maintain strengths and strengthen weaknesses. Hopefully, this occurred, and a different list of strengths and weaknesses can be developed.
- ❑ A review of what would be done differently if the year were to be repeated.
- ❑ A list of recommendations will be helpful for future planning.

When putting together the Annual Report, bear in mind the annual reports corporations give to shareholders. These documents highlight the successes of the company and show how the company overcame obstacles. Remember, the “shareholders” are the members.

SECTION FIVE—Sample Chapter Plan of Action

Use this simple planning guide to assist in your own planning session.

The objective of the YOURTOWN Jaycees is to offer programs to our members to develop themselves and better our community. Specific goals for the year are:

1. _____
2. _____
3. _____
4. _____
5. _____

The following procedures were used to determine the needs of the chapter and the community we serve:

- Results from Community Survey
- Results from Membership Survey
- Planning Board sessions on:
 - _____
 - _____
 - _____
- _____
- _____
- _____

Specific member needs are:

- Social opportunities
- Recognition
- Leadership programs
- Family projects
- _____
- _____

Specific chapter needs are:

- Activation
- Training
- Communications
- Public Awareness
- _____
- _____

Specific community needs are:

- Community center

- ❑ Activities for teenagers
- ❑ Elderly assistance
- ❑ _____
- ❑ _____
- ❑ _____

Through planning, we determined the following chapter strengths and weaknesses:

STRENGTHS

WEAKNESSES

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Using the above planning process, the following potential chapter problems and their possible solutions were discussed:

Problem: Low activation

Solution: Better communication, utilize theme meetings to increase attendance, offer incentives, etc.

Problem: _____
 Solution: _____

Problem: _____
 Solution: _____

Problem: _____
 Solution: _____

Problem: _____
 Solution: _____

Problem: _____
 Solution: _____

After reviewing all of the above information, the following long-range goals were approved by the chapter:

1. _____
2. _____
3. _____
4. _____
5. _____

6. _____

After reviewing all of the above information, the following short-term goals were set in each of the following Areas of Opportunity.

BUSINESS Area of Opportunity

This Area provides an opportunity for individual members to contribute to the development and enhancement of the economic infrastructure, prosperity, and well-being for all nations.

This Area focuses on the promotion and improvement of business education and knowledge for chapter and community members, such as career advancement, investing, building a business, etc.

Objective: _____

Strengths: _____

Weaknesses: _____

Goals: To conduct _____ investing seminars
To conduct _____ career advancement trainings
To conduct _____ business training sessions

Projects: _____

Membership Recruitment Through Business Area of Opportunity

Goal: To recruit _____ new members through business opportunity projects.

Evaluation of Area to be completed on a quarterly basis.

MANAGEMENT Area of Opportunity

This area develops the managerial skill of the individual member at all levels of the organization and includes the below.

Ways and Means, Audit, Insurance, Incorporation, Taxes: Recognizes success in managing the financial aspects of the chapter. Examples are projects, activities, and functions that deal with raising funds for chapter operation, ways and means, and financial and budget reports (i.e. car wash, pancake breakfast, insurance review, Treasurer’s report).

Public Relations: Projects, activities, and functions conducted to promote the image of the chapter and the Junior Chamber movement in the community (i.e. Distinguished Service Awards programs such as TOYA and OYF, parades, pageants, web site and ongoing public relations work).

Socials, Awards, Sports, Meetings, Visitations, etc.: All projects and activities conducted with the purpose of providing activities for members (i.e. sports outing, chapter picnic, ice cream social, hosting Executive Board meetings, hosting Region meetings, attending State meetings).

Planning, Evaluation: Projects conducted with a primary focus in the planning and evaluation aspect of chapter management (i.e. chapter and community surveys, Blue Chip, Mid-Year Evaluation, Annual Report).

Objective: _____

Strengths: _____

Weaknesses: _____

- Goals: To conduct _____ ways and means projects with a total net profit of \$_____
- To provide _____ written financial reports to the general membership
- To review and renew chapter insurance policy
- To file incorporation papers
- To end the year with \$_____ in the bank
- To conduct _____ public relations projects
- To participate in _____ parades

- To run _____ PSAs on television/cable access/radio
- To create a chapter web site
- To appear in the local paper at least _____
- To hold _____ socials
- To conduct a chapter awards program
- To conduct a once-a-month Board of Directors meeting
- To conduct a once-a-month General Membership meeting
- To produce a once-a-month newsletter
- To provide incentives to members for recruiting
- To retain _____% of the membership
- To conduct _____ Chairman's Planning Guide (CPG) trainings
- To meet all submission deadlines for the USJC Blue Chip program
- To conduct evaluations of the chapter plan within 30 days of the end of each quarter
- To record and distribute minutes for Board of Directors meetings
- To record and distribute minutes for General Membership meetings

Projects:

Membership Recruitment Through Management Area of Opportunity

Goal: To recruit _____ new members through business opportunity projects.

Evaluation of Area to be completed on a quarterly basis.

INDIVIDUAL Area of Opportunity

This Area focuses on training and activities that improve the quality of life of members. Examples would be personal improvement, family values, spiritual development, Time and stress management, communication skills, etc.

Objective:

Strengths:

Weaknesses: _____

Goals: To have _____ members compete in Local/Regional/State Speak-Up competition
To have _____ members compete in Local/Regional/State Write-Up competition
To conduct _____ personal skills projects
To conduct _____ family life projects
To conduct _____ spiritual development projects
To advance _____ % of the membership one or more Degrees of Jaycees
To have _____ % of officers attend state-sponsored training

Projects: _____

Membership Recruitment Through Individual Area of Opportunity
Goal: To recruit _____ new members through business opportunity projects.

Evaluation of Area to be completed on a quarterly basis.

COMMUNITY Area of Opportunity

This Area develops the sensitivity of individual members to societal problems and community dynamics by providing experience in community problem solving.

Human Services, Community Improvement: The promotion and improvement of the quality of life for people in the community by working directly with people and through improvement of resources or facilities in the community. It involves projects and activities that deal directly with people, such as youth and elderly assistance, health and safety, economic development, and environment (i.e. Easter egg hunt, breakfast with Santa, Community Care Day, community food pantry).

Community Fundraising: Success in raising funds for programs that are not Jaycee managed, such as health related organizations, foundations, or any organized community charities (i.e. Easter Seals, March of Dimes).

State/National Jaycee Involvement: Promotion and implementation of state or national emphasis programs. Consult your state organization for a list of state programs. The National Chapter Projects include Jaycees Against Youth Smoking (JAYS), Outstanding Young Farmer (OYF), Junior Chamber Family AIDS Network, etc.

Government Involvement: Involvement with local, state, and national governmental process. Projects and activities include town forums, debates, Get Out the Vote projects, City Council meetings, etc.

Recruitment, Extensions, Chapter Assistance: Projects and activities targeted at recruiting new members and establishing new chapters. Providing Jaycee opportunities to previously uninvolved community members and into communities with no Jaycee chapter are community service items.

Objective: _____

Strengths: _____

Weaknesses: _____

- Goals:
- To conduct _____ youth projects
 - To conduct _____ underprivileged projects
 - To conduct _____ community fundraising projects raising \$ _____
 - To conduct _____ community involvement projects
 - To have _____ members participate in _____ state trainings
 - To conduct _____ governmental involvement projects
 - To conduct quarterly recruitment drives
 - To set up _____ membership booths at various community functions
 - To complete _____ new chapter extensions
 - To create a letter welcoming new members to the chapter
 - To participate in _____ City Council meetings
- _____

Projects: _____

Membership Recruitment Through Community Area of Opportunity

Goal: To recruit _____ new members through business opportunity projects.

Evaluation of Area to be completed on a quarterly basis.

INTERNATIONAL Area of Opportunity

This Area provides an opportunity for individual members to contribute to the development of goodwill, understanding, and cooperation among all peoples. This Area focuses on providing assistance or promoting understanding and communication between the chapter and people outside the United States (i.e. Twinning with an international JCI Chapter, World Congress).

Objective: _____

Strengths: _____

Weaknesses: _____

Goals: To conduct _____ international involvement projects

Projects: _____

Membership Recruitment Through International Area of Opportunity

Goal: To recruit _____ new members through business opportunity projects.

Evaluation of Area to be completed on a quarterly basis.

The following documents should be completed/assembled and attached to the chapter plan:

- ❑ Roster of Chapter Officers and Duties including name, address, phone number, e-mail
- ❑ Calendar of Events for the Year including dates of Board of Directors and General Membership meetings, proposed projects, membership nights, proposed dates for starting and completing extensions
- ❑ Proposed Chapter Budget for the year including projected income and expenses in each Area of Opportunity
- ❑ Membership Plan for the Year including when each member is due for renewal, projects of renewal percentages, and how many new members must be recruited to keep the chapter at growth