\*\*Space for Chapter Logo\*\*

**JCI Anytown**

**P.O. Box xxxx**

**Anytown, MI 60000**

**Chapter Plan of Action**

***2022***

**Michigan**

**Evaluation Period\***

|  |  |
| --- | --- |
| **☐** | **Initial Submission** |
| **☐** | **Quarter 1**  |
| **☐** | **Quarter 2**  |
| **☐** | **Quarter 3** |
| **☐** | **Year End/Final Evaluation** |
| **☐** | **Other: .** |

**\*To check the boxes, double click it and select “Checked”.**

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#

# Overview

##

## Mission Statement

Why do you exist?

## Vision Statement

What is your vision for your chapter?

##

## Purpose Statement

What is the purpose of your chapter? Can use JCI purpose.

## Problem Statement

This should be a problem or hurdle you want to overcome this year. This is your primary focus goal at all times.

#

# JCI ANYTOWN BOARD OF DIRECTORS

|  |  |
| --- | --- |
| Name - PresidentOversees all chapter activitiesemail |  Name - Chairman of the BoardAdvises President and board email |
| Name - Vice PresidentResponsibilities email |  Name - Vice PresidentResponsibilities email |
| Name - Vice PresidentResponsibilities email | Name - DirectorResponsibilities email |
| Name - DirectorResponsibilities email | Name - DirectorResponsibilities email |
| Name - SecretaryResponsibilities email | Name - TreasurerResponsibilities email |

**Note: Your chapter board may have different positions, more or less members. The purpose of this chart is to see and understand your BOD team and their responsibilities.**

## January Base Membership Roster

|  |  |  |
| --- | --- | --- |
| **Name** | **Birthdate** | **Join Date** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# Chapter SWOT Analysis

## SWOT

This should be done collectively at minimum by the Board of Directors; often you’ll have more buy-in from members if they are included in conducting a SWOT to help their voice be heard.

|  |  |
| --- | --- |
| **Strengths** | **Weaknesses** |
| * Use a bulleted list structure
* These are internal factors
 | * Use a bulleted list structure
* These are internal factors
 |
| **Opportunities** | **Threats** |
| * Use a bulleted list structure
* These are external factors
 | * Use a bulleted list structure
* These are external factors
 |

## SWOT Strategies

Areas of overlap are evaluated to develop strategies that take advantage of the opportunities presented.

|  |
| --- |
| **STRENGTHS/OPPORTUNITIES STRATEGIES (OVERLAP)** |
| * EXAMPLE: Use our strong marketing to better promote our events
 |
| **WEAKNESSES/OPPORTUNITIES STRATEGIES (OVERLAP)** |
| * EXAMPLE: Use our members’ current professional successes to market the organization
 |

# Chapter Goals & Objectives

As your chapter is determining your chapter goals and objectives, we encourage you to determine how the [UN Sustainable Development Goals](https://www.undp.org/content/undp/en/home/sustainable-development-goals.html#:~:text=The%20Sustainable%20Development%20Goals%20(SDGs,peace%20and%20prosperity%20by%202030.) fit into your projects. You will also see in the Areas of Opportunity there is a section to add which goal(s), your project is working towards.

****

Long-term Goals 2+ Years: (What does your chapter want to look like in 2+ years)

* Goal One:
	+ Objective to achieve defined goal
* Goal Two:
	+ Objective to achieve defined goal
* Goal Three:
	+ Objective to achieve defined goal

Short-term Goals – Current Year: (7-10 obtainable goals)

* Goal One:
	+ Timeline:
	+ Objective to achieve defined goal
* Goal Two:
	+ Timeline:
	+ Objective to achieve defined goal
* Goal Three:
	+ Timeline:
	+ Objective to achieve defined goal

# Planning Through Areas of Opportunity

## Areas of Opportunity

Using each of these areas, define what they mean for your chapter, how you’ll better them in the coming year, actions, challenges, and objectives needed to meet targets of these areas.

* Community Impact
* Empower Members
* Financial Planning
* Collaborate with Partners

#### Community Impact

***JCI \_\_\_\_\_\_\_will enable communities to achieve sustainable impact.***

|  |  |  |  |
| --- | --- | --- | --- |
| 1. **Goals**
 | **Tactic** | **Month/Date of Project** | **UN Development Goal**  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Expected Outcome:**

**What are you expecting your chapter hoping to accomplish with your community development goals and tactics?**

**Impact Area Pre-Evaluation Strengths and Weaknesses**

|  |
| --- |
| **Things We'd Like To Keep - they work well (Strengths):** |
|  |
|  |
|  |
|  |

|  |
| --- |
| **Things We'd Like To Change (Weaknesses):** |
|  |
|  |
|  |
|  |

(To be completed on a quarterly basis. Please include revised strengths and weaknesses, results of listed goals, and project completion dates. – Replace text with aforementioned criteria – you may want to color code your quarters for easier reference)

**Quarter 1**

**Quarter 2**

**Quarter 3**

**Year End/Final Evaluation**

####

####

#### Empower Members

***JCI \_\_\_\_\_\_\_ will create an environment in which***

***members are empowered to make positive change.***

|  |  |  |  |
| --- | --- | --- | --- |
| 1. **Goals**
 | **Tactic** | **Month/Date of Project** | **UN Development Goal**  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Expected Outcome:**

**What are you hoping your chapter will accomplish to motivate, engage, retain and recruit members?**

**Impact Area Pre-Evaluation Strengths and Weaknesses**

|  |
| --- |
| **Things We'd Like To Keep - they work well (Strengths):** |
|  |
|  |
|  |
|  |

|  |
| --- |
| **Things We'd Like To Change (Weaknesses):** |
|  |
|  |
|  |
|  |

(To be completed on a quarterly basis. Please include revised strengths and weaknesses, results of listed goals, and project completion dates. – Replace text with aforementioned criteria – you may want to color code your quarters for easier reference)

**Quarter 1**

**Quarter 2**

**Quarter 3**

**Year End/Final Evaluation**

####

#### Financial Planning

***JCI \_\_\_\_\_\_will create a financial plan that invests in long-term goals.***

|  |  |  |  |
| --- | --- | --- | --- |
| 1. **Goals**
 | **Tactic** | **Month/Date of Project** | **UN Development Goal**  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Expected Outcome:**

**What are you expecting your chapter will accomplish in achieving financial goals?**

**Impact Area Pre-Evaluation Strengths and Weaknesses**

|  |
| --- |
| **Things We'd Like To Keep - they work well (Strengths):** |
|  |
|  |
|  |
|  |

|  |
| --- |
| **Things We'd Like To Change (Weaknesses):** |
|  |
|  |
|  |
|  |

(To be completed on a quarterly basis. Please include revised strengths and weaknesses, results of listed goals, and project completion dates. – Replace text with aforementioned criteria – you may want to color code your quarters for easier reference)

**Quarter 1**

**Quarter 2**

**Quarter 3**

**Year End/Final Evaluation**

####

#### Collaborate with Partners

***JCI \_\_\_\_\_\_\_\_ will bring together like-minded partners in order to expand mutual impact.***

|  |  |  |  |
| --- | --- | --- | --- |
| 1. **Goals**
 | **Tactic** | **Month/Date of Project** | **UN Development Goal**  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Expected Outcome:**

**How are you expecting your chapter to collaborate with other organizations?**

**Impact Area Pre-Evaluation Strengths and Weaknesses**

|  |
| --- |
| **Things We'd Like To Keep - they work well (Strengths):** |
|  |
|  |
|  |
|  |

|  |
| --- |
| **Things We'd Like To Change (Weaknesses):** |
|  |
|  |
|  |
|  |

(To be completed on a quarterly basis. Please include revised strengths and weaknesses, results of listed goals, and project completion dates. – Replace text with aforementioned criteria – you may want to color code your quarters for easier reference)

**Quarter 1**

**Quarter 2**

**Quarter 3**

**Year End/Final Evaluation**

# **Marketing and Communication Plan**

***Goals:***

***Branding Development:***

Ex. Increase name/logo awareness within community

***Social Media:***

Ex. Post multiple times a week, engage members and community

***Communications Channels:***

Ex. How do you community with members, the community, partners

## Calendar of Marketing:

Table is just an example.

|  |  |
| --- | --- |
| **Event** | **Date** |
| Print Postcards and Business Cards | January 2022 |
| Mail Sponsorship Letters | March-May 2022 |
|  | April |
| Order New T-Shirts for General Members | April |
| Order new shirts for Board of Directors | April/May |
| **Monthly Meeting Promotion** | ongoing monthly |
| Set up Facebook Event | Beginning of 2022 |
| Set up MeetUp Event | Beginning of 2022 |
|  |  |
| **Internal FB Group Promotion** | various |
| Set up Facebook Event | at least 2 weeks prior |
| Set up MeetUp Event | at least 2 weeks prior |
|  |  |
| **Large Community Event**  | March 7, 2022 |
| Set Up Facebook Event | February  |
| Set Up MeetUp Event | February  |

## Communications Plan:

Table is just an example.

##

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|   | **Deliverable** | **Description** | **Delivery Method** | **Frequency** | **Owner** | **Audience** |
| **Internal** | Monthly Meeting | Meeting to discuss upcoming projects and events, guest speaker | Meeting | Monthly | President | General Members and Guests |
| Needs of Membership | Survey of the Social, Community, Operations, Membership needs of the Chapter | Survey | Annually | President | General Members |
| Membership Renewals | Request Dues | Email | Monthly | Treasurer | General Members |
| Newsletter | Official Newsletter of the Ann Arbor Jaycees | Mailchimp/Email | Monthly | Newsletter Editor / COB | General Members |
| Board of Director Meeting Minutes | Minutes from recent meeting | Email | Monthly | President / COB | Board of Directors |
| New Member Orientations | Orientation about the Chapter to new members | Meeting | Quarterly | Membership Vice President | New Members |
| Updates | Updates about new members, monthly meetings, other events | Email | ≥ Monthly | President | General Members |
| Projects and Events | Community, Social, Fundraising, State Events | Email/Crier/ Social Media / Text | ≥ Monthly | President/Crier Editor/VPs/Committee Chairs | General Members and Potential Members |
| **External** |  Social Events | Promotion and Updates | Email/ Meeting /Social Media/News Publications/ Phone Calls  | Weekly | Project Chair |  |
| Community Events | Promotion, updates, and ticket sales | Email/ Meeting /Social Media/News Publications/ Phone Calls  | Variable | Committee |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

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#

# **Needs of Membership**

What did you learn from your membership survey? Things to consider answering: What are your members hoping to accomplish this year? What types of projects do they want to run? Why are they members of your chapter?

#

# **Needs of Community**

Insert evaluation of community needs, survey or results here.

# **Business and Local Government Partner Evaluation**

*Current Partners:*

* EX. Boy Scouts – This organization we provide one fundraiser a year for them. We have the opportunity to leverage this organization to pull in parents to our organization.
*
*
*

*Potential Partners:*

* EX. City Commission – We need the buy in of these city officials to complete larger projects. We can start a relationship with them by having a representative at each city meeting and inviting them to ours.

# **Membership Plan**

(Use this Membership Plan to help understand your membership recruiting needs. Once your needs are identified then plan your calendar of events around those difficult months. For example: If you have a lot of members due in the second quarter, then your chapter should be running a more programming this quarter prior and during to help offset members lost. For example – Socials, Community Fundraisers, Membership Drives, Networking Events, etc. Plan your calendar of events based off of this Membership Plan of Action.)

HOW TO USE THE MEMBERSHIP TABLE/SPREADSHEET:

* Input your January 1 Base Chapter Member number in the box under the “No. Members” Column for Quarter 1.
* Input the number of members due each quarter in the “Number Due” column. (This information can be found in the membership database, [www.jayceemember.com](http://www.jayceemember.com), or request the information from a state officer.)
* Input the number of members that are up for renewal each quarter that you expect to retain their Jaycee membership in the “Number Retained” column.
* Input the number of new members you expect to gain each quarter.
* Insert the “Quarter End” number as the “No. Members” for the next month. (ie: If Quarter End = 20 for January, insert 20 for “No. Member” for February)
* The “Quarter End” number for December is the quantity of members you plan to have in the Chapter at the end of the year.

Current:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|   | 2019 | 2020 | 2021 | **Projected 2022** |
| Beginning Membership | 50 | 51 | 50 | 55 |
| Year End Membership | 51 | 50 | 55 | 60 |
| Membership Gain/Loss | +1 | -1 | +5 | +5 |
| New Members | 3 | 2 | 7 | 6 |
| Member Drops | 2 | 3 | 2 | 1 |

**Actuals**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Quarter | No.Members | -Number Due | =Beginning Month  | +Number Retained  | +New Members | =Quarter End  |
| 1 |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |

# **Chapter Budget**

*(Below is an example of a budget. Feel free to use this template or insert your own.)*

|  |  |  |
| --- | --- | --- |
|  | **INCOME** | **EXPENSE** |
| **BUSINESS**  |  |  |
| Business-related Projects |  |  |
| Leadership Projects |  |  |
| Ways & Means Projects |  |  |
| Member Dues |  |  |
| Corporate Sponsorships |  |  |
| Insurance, Incorporation, Taxes, Audit |  |  |
| Public Relations |  |  |
| Chapter Newsletter & Brochure |  |  |
| Chapter Website & Hosting |  |  |
| Chamber of Commerce Membership Dues |  |  |
| Surveys |  |  |
| Miscellaneous Operations |  |  |
|  **TOTAL** |  |  |
| **Membership** |  |  |
| Financial Planning Projects |  |  |
| Personal Skills Projects |  |  |
| Family Life Projects |  |  |
| Spiritual Development Projects |  |  |
| Chapter Socials |  |  |
| Chapter Awards |  |  |
| Write-Up/Speak-Up/Armbruster/Brownfield/Debate |  |  |
| Membership Recruitment |  |  |
| New Member Orientations |  |  |
| New Member Packets |  |  |
| Recruiting Incentives |  |  |
| Membership Training |  |  |
| Officer Training |  |  |
| Printing for Meetings |  |  |
| Miscellaneous Operations |  |  |
|  **TOTAL** |  |  |
| **COMMUNITY** |  |  |
| Community Service Projects |  |  |
| Community Fundraising Projects |  |  |
| Governmental Involvement Projects |  |  |
| Children & Youth Projects |  |  |
| Miscellaneous Operations |  |  |
|  **TOTAL** |  |  |
| **Other** |  |  |
| State & National Involvement Projects |  |  |
| International Involvement Projects |  |  |
| Miscellaneous Operations |  |  |
|  **TOTAL** |  |  |
|  **GRAND TOTAL** |  |  |

# **2022 Calendar of Events**

*(Below is an example of a Chapter’s Calendar of Events. Insert your Meeting and Project Dates accordingly)*

|  |  |
| --- | --- |
| **January 2022**3 - Third Trimester Competitions Registration 8 - BOD15 - GMM16 - Judgement Day**February**5 - BOD18 - GMM19-21 - JCI MI 2020 Year End Conference, Kalamazoo, MI22- Chapter Plan due **March**4 - BOD18 - GMM**April**1 - BOD18 - GMM22-25 - JCI USA 2020 Year End Conference, Billings, MT**May**6 - BOD7-9 - JCI MI May Conference, Boyne, MI 20 - GMM**June**3 - BOD17 - GMM | **July**1 - BOD15 - GMM**August**5 - BOD19 - GMM**September**2 - BOD16- 19 - JCI USA Annual Meeting/Celebration of the Century, St. Louis, MO**October**7 - BOD21 - GMM**November**4 - BOD18 - GMM**December**2 -BOD 16 - GMM 31 - T3 Close Out  |

# **Attachments**:

Delete this page, or provide a separating Title Page/Index for Attached Documents. You can list the page as “Appendix” and provide a list of contents. In your Table of Contents, all you would have to list is “Appendix” and refer to this page number. If you forgo the Appendix/Index on this page, then list the documents attached individually in your Table of Contents.

**ATTACH THE FOLLOWING DOCUMENTS:**

* ***Chapter Constitution & Bylaws***
* ***Chapter Incorporation*** (A copy of your chapter’s incorporation papers)
* ***Liability Insurance*** (A copy of your Insurance Policy Notice)
* ***A screen shot or copy of tax form 990 completed***

**Suggested Attachments:**

* ***Member Survey or Survey Results***
* ***Any other documents you use to plan your year***
* ***Year-End Reporting which includes:***
	+ ***Summary and evaluation letter from the President***
	+ ***Final Budget***