

# Chapter Plan of Action

**JCI Michigan**

**Chapter Name: \_\_\_\_\_**

[ Insert Chapter Logo Here ]

## **Semester Evaluations:**

- |  |
|--|
| ● Initial Submission Date: <b>February 11 2024</b>             |
| ● Semester 1 Evaluation Due Date: <b>July 10 2024</b>          |
| ● Semester 2/Year End/Final Evaluation Date: <b>Jan 8 2025</b> |

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## Chapter Plan Checklist

- Chapter & Board of Directors Contact Information
- Overview (Mission Statement, Vision Statement, Purpose Statement)
- Chapter Objectives and Key Results (OKRs)
- Programming Plan
- Membership Plan
- Surveys
- Community Partnerships Plan
- Diversity, Equity, and Inclusion (DE&I) Plan
- Marketing Plan
- Calendar of Chapter Events
- Budget

## Resources

### **Additional information on Objectives and Key Results planning:**

- <https://www.wrike.com/blog/okrs-quarterly-planning/>
- <https://www.mural.co/templates/okr-planning>

### **Fundraising and Grant Resources:**

- <https://www.michigan.gov/leo/boards-comms-councils/mcsc/nfr/funding/michigans-amer-icorps-funding/grants-from-michigan-foundations-and-corporations>
- <https://www.grantwatch.com/grants-for-nonprofits>

### **Free Online Grant Writing Classes:**

- <https://www.nonprofitready.org/grant-writing-classes>
- <https://candid.org/>

### **Top Giving Foundations in MI:**

- <https://www.tgci.com/funding-sources/mi/top>
- [Grant Writing Made Easy Guide](#)
- [USJCCF\\_StateAndLocal\\_GrantApplication-0921.docx](#)

## Chapter & Board of Directors Contact Information

<b>Chapter Contact Information:</b>	
Chapter Email:	
<b>Board of Directors Contact Information:</b>	
(insert rows as necessary):	
President's Name:	
President Email:	
President Phone Number:	
Chairman of the Board Name:	
Chairman of the Board Email:	
Vice President Name:	
Vice President Email:	
Director Name:	
Director Email:	
Secretary Name:	
Secretary Email:	
Treasurer Name:	
Treasurer Email:	

## **Overview**

### **Mission Statement**

Why do you exist?

### **Vision Statement**

What is your vision for your chapter?

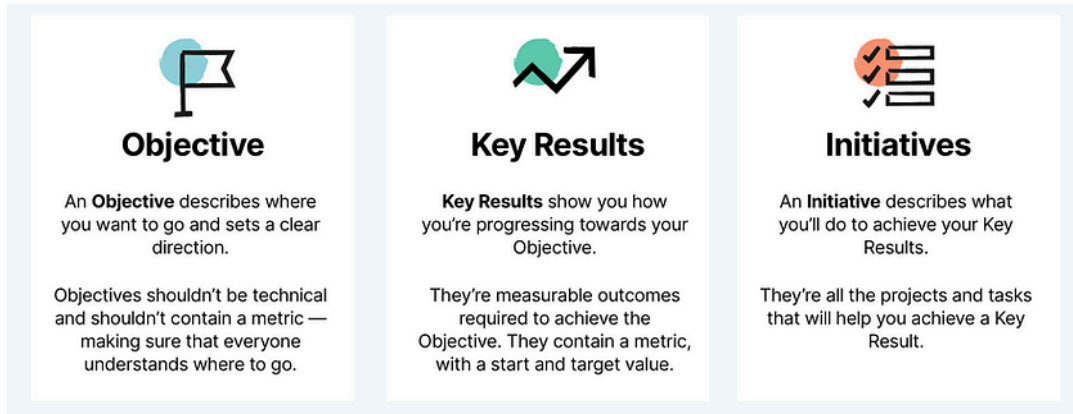
### **Purpose Statement**

What is the purpose of your chapter? (You can use the JCI purpose statement).

## Chapter Objectives, and Key Results (OKR's)

### OKR Explanation:

Your objectives may include your plans for **community impact**, how you will **empower your members**, your **financial planning**, your **marketing and communications planning**, and how you will **collaborate with partners**.



- Example 1 Objective: Create the necessary environment for our members to participate in more development opportunities.
  - Example Key Result: Increased number of Michigan participants in NAA
  - Example Key Result: Development of a grant for member development
  - Example Key Result: More Michigan Delegates participating in National Conferences.
- Example 2 Objective: Create a sustainable organization for the future.
  - Example Key Result: Align our JCI Michigan efforts with the organization's mission and vision.

### UN Sustainable Development Goals:

JCI partners with the UN and has a project category for UN Sustainable Development Goal Projects. Below are the UN SDG's to consider as you plan programming for the year.

As you are determining your chapter objectives, we encourage you to determine how the [UN Sustainable Development Goals](#) fit into your chapter plan and projects (see chart below).



**Chapter Objectives:**

<b>Objective 1:</b>	
<b>Key Result 1a</b>	
<b>Key Result 1b</b>	
<b>Key Result 1c</b>	
<b>Objective 2:</b>	
<b>Key Result 2a</b>	
<b>Key Result 2b</b>	
<b>Key Result 2c</b>	
<b>Objective 3</b>	
<b>Key Result 3a</b>	
<b>Key Result 3b</b>	
<b>Key Result 3c</b>	
<b>Objective 4:</b>	
<b>Key Result 4a</b>	
<b>Key Result 4b</b>	
<b>Key Result 4c</b>	
<b>Objective 5</b>	
<b>Key Result 5a</b>	

<b>Key Result 5b</b>	
<b>Key Result 5c</b>	



## Programming

Use this as a template to structure your chapter's programming for the year. Categories include Financial Development, Community, Individual, or Membership. (*Membership* means Recruitment, Activation, or Retention. *Individual* means focus on actual skills development in members.)

Project Title	Category	Month of Program	Chair or Committee Members	Proposed Budget Income	Proposed Budget Expense	Proposed Net (Income – Expense)

Provide additional details as needed:

## 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 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. GlueUp doesn’t record your January 1st number, but the Membership and Programming Vice Presidents (Kimmy Black and Kayleigh Gratz) recorded base numbers for the entire state. Your base number is also required for Single Project Entry submissions and many awards.
- To pull monthly info, you can filter the roster in GlueUp to show expiration dates by month.
- Input the number of members that are up for renewal each month that you expect to retain their Jaycee membership in the “Number Retained” column.
- Input the number of new members you expect to gain each month.
- Insert the “Quarter End” number as the “No. Members” for the next month. (ie: If Month End = 20 for January, insert 20 for “No. Member” for February)
- The “Month End” number for December is the quantity of members you plan to have in the Chapter at the end of the year.

### Membership:

Month	No.Members	- Number Due	+ Number Retained	+ New Members	= Month End
Jan					
Feb					
Mar					
Apr					
May					

Jun					
Jul					
Aug					
Sep					
Oct					
Nov					
Dec					

## Corrective Action Plan (For Chapters Under 20):

If your chapter receives a notice from JCI USA for being under 20, you have the following options: to pay an invoice for outstanding members (~\$30/member under 20, for example a chapter with 18 members owes \$60), or submit a Corrective Action Plan.

The Corrective Action Plan should detail the steps you would take to bring your chapter up to 20 members in a 90-day span. Below is an example of a 90-day plan. The Corrective Action Plan should include a bit more detail (such as creating a Project Management Guide).

If you make progress but don't get quite to 20 within the 90 days, you can submit a request to the National President for an extension.

Month	Project	# of Potential Members Targeted	Beginning Number	Number Recruited as result	End Number
Jan	Bowling social	5	12	3	15
Feb	Encourage members to bring a friend to Skills Training	8	15	1	16
Mar	St Patrick's Day Parade volunteers	20	16	4	20

## Surveys

### **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? The Membership Handbook on jcimi.org has examples of a membership survey. Enter results here.

### **Needs of Community**

Conduct a community survey. This can be as easy as a google form QR code at the info table at a project. Ask things such as what types of community events one would be more inclined to attend, their age bracket, and if they would be interested in learning more about JCI (ask for contact info with this!). Enter results here.

## Community Partnerships

**Goals for utilizing community partnerships this year:** Are you looking for new sponsors? Planning a project that relies on involvement from city government or local businesses? Have a fundraiser in mind to help a specific nonprofit?

**Existing Community Partnerships:** List here

**Community Entities to Partner With:** List here

## Diversity, Equity and Inclusion (DE&I) Planning

What organizations exist in your area? (Examples: Veteran Associations, LGBTQ+ owned businesses, etc.)

- Company 1
- Company 2
- Company 3

How can you partner with these organizations?

- Company 1 (Same as above): Info on how will partner
- Company 2 (Same as above): Info on how will partner
- Company 3 (Same as above): Info on how will partner

How do you plan to implement Diversity, Equity and Inclusion at your chapter?

## Marketing 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 communicate with members, the community, partners

### Calendar of Marketing:

Table is just an example.

<b>Event</b>	<b>Date</b>
Print Business Cards	January 2024
Mail Sponsorship Letters	March-May 2024
Order New T-Shirts and Nametags for Members	March
<b>Monthly Meeting Promotion</b>	ongoing monthly
Set up Facebook Event	Beginning of 2024
Set up MeetUp Event	Beginning of 2024
<b>Internal FB Group Promotion</b>	various
Set up Facebook Event	at least 2 weeks prior
Set up MeetUp Event	at least 2 weeks prior
<b>Large Community Event</b>	March 7, 2024
Set Up Facebook Event	February
Set Up MeetUp Event	February

***Communications Plan:***

Table is just an example.

	<b>Deliverable</b>	<b>Description</b>	<b>Delivery Method</b>	<b>Frequency</b>	<b>Owner</b>	<b>Audience</b>
<b>Internal</b>	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
	Newsletter	Official Newsletter of the Ann Arbor Jaycees	Mailchimp/Email /GlueUp Campaign	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
<b>External</b>	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	Variable	Committee	

## Calendar of Events

Insert your Meetings, Events, and Project Dates accordingly. If dates are unknown, list “TBD” in the appropriate month.

<b>Calendar Year: 2024</b>	
<b>January</b>	
Date:	Event/Project Title:
Date:	Event/Project Title:
Date:	Event/Project Title:
<b>February</b>	
Date:	Event/Project Title:
Date:	Event/Project Title:
Date:	Event/Project Title:
<b>March</b>	
Date:	Event/Project Title:
Date:	Event/Project Title:
Date:	Event/Project Title:
<b>April</b>	
Date:	Event/Project Title:
Date:	Event/Project Title:
Date:	Event/Project Title:
Date:	Event/Project Title:
<b>May</b>	
Date:	Event/Project Title:
Date:	Event/Project Title:
Date:	Event/Project Title:



Date:	Event/Project Title:
<b>June</b>	
Date:	Event/Project Title:
Date:	Event/Project Title:
Date:	Event/Project Title:
<b>July</b>	
Date:	Event/Project Title:
Date:	Event/Project Title:
Date:	Event/Project Title:
<b>August</b>	
Date:	Event/Project Title:
Date:	Event/Project Title:
Date:	Event/Project Title:
<b>September</b>	
Date:	Event/Project Title:
Date:	Event/Project Title:
Date:	Event/Project Title:
Date:	Event/Project Title:
<b>October</b>	
Date:	Event/Project Title:
Date:	Event/Project Title:
Date:	Event/Project Title:
Date:	Event/Project Title:
<b>November</b>	
Date:	Event/Project Title:

Date:	Event/Project Title:
Date:	Event/Project Title:
<b>December</b>	
Date:	Event/Project Title:
Date:	Event/Project Title:
Date:	Event/Project Title:

## Budget

Below is an example of a budget. Feel free to use this template, insert your own, or attach an excel document.

	<b>INCOME</b>	<b>EXPENSE</b>
<b>BUSINESS</b>		
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		
<b>TOTAL:</b>		
<b>Membership</b>		
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		
<b>TOTAL:</b>		
<b>COMMUNITY</b>		
Community Service Projects		
Community Fundraising Projects		
Governmental Involvement Projects		

Children & Youth Projects		
Miscellaneous Operations		
<b>TOTAL:</b>		
<b>Other</b>		
State & National Involvement Projects		
International Involvement Projects		
Miscellaneous Operations		
<b>TOTAL:</b>		
<b>GRAND TOTAL:</b>		

**STOP!**

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(To be evaluated on a quarterly basis. Please include revised objectives, key results, and initiatives. – 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**

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