



THE BOOK: Chapter Management

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Profile of a Healthy Chapter

Definition of a Healthy Chapter: One that has the ability to attract and retain people.

A healthy chapter is an active chapter with annual growth. This membership growth is a result of chapter activities meeting predetermined needs.

A healthy chapter holds regularly scheduled, monthly Board and membership meetings in a well-publicized location with a published agenda. The membership meeting lasts no more than 90 minutes, and the program is limited to 20 minutes. At least 25 to 50 percent of the membership attends.

A healthy chapter completes a written member survey to determine member interests at the beginning of each year. From the results of this survey, programs for the membership meetings are scheduled and published in the newsletter.

A healthy chapter also conducts a community survey. Armed with survey results, the membership agrees on those community projects that could have the greatest impact, not only on the community but also on the members. These are scheduled into the chapter plan. Chairpersons are chosen either from volunteers who want to chair the project or by personal invitation to interested members. In this way, members know in advance who is in charge.

A healthy chapter holds monthly orientation meetings for new members to conduct new member surveys, to acquaint new members with the Jaycee organizational structure, and to fuel new member expectations for success through Jaycees. New members should be encouraged to attend meetings, serve on committees, chair pro-

jects, and share Jaycees by helping others to join.

A healthy chapter publishes a calendar of events so members know in advance what is going on. The calendar is consistently updated in the chapter newsletter and directors contact their assigned members regularly through a “calling tree.”

A healthy chapter holds regular Board meetings. The Treasurer and each chapter officer gives a report, progress on chapter Blue Chip is discussed, and Degrees of Jaycees activities are reviewed. The chapter calendar is reviewed, as are the chapter goals and those members who will be up for renewal in the next 90 days. Results are reported to the membership at general meetings.

A healthy chapter keeps up with members and activities. While project results are important, a healthy chapter does not lose sight of the overwhelming importance of keeping members as the single priority. It does as much as it can without overloading its members and budget. Chapter officers ensure every project and program is in line with chapter goals and is what the members and community want and need.

A healthy chapter has leaders who call their assigned District and Regional Directors, past chapter officers, state officers, state service center, and the National Service Center for assistance whenever they need it. They use every resource at their disposal to ensure that chapter goals are reached.

A healthy chapter provides the opportunity to its members to participate in state, national, and international events, thereby allowing members to truly be a member of the global community.

The Basic Needs of People in Groups

In order to be a great leader or project chairperson: THE BASIC NEEDS OF PEOPLE IN GROUPS MUST BE MET. If any group or organization wants the loyalty, interest, and the best efforts of its members, it must take into account the fact that the members need:

1. A sense of belonging. (They want to be wanted.)
 - a. A feeling that no one objects to their presence.
 - b. A feeling that they are sincerely welcome.
 - c. A feeling that they are honestly needed for themselves, not just for their hands or their money.
2. To have a share in planning the group's goals (a need that will be satisfied only when their ideas have had a fair hearing).
3. To feel that the goals are within reach and that they make sense.
4. To feel that what is being done has real purpose, or contributes to human welfare — that its value extends beyond the group itself.
5. To share in making the rules of the group — the rules by which together people will live and work toward goals.
6. To know in some clear detail just what is expected so they can work confidently.
7. To have responsibilities that challenge, that are within range of their abilities and interest, and that contribute toward reaching goals.
8. To see that progress is being made toward the goal.
9. To be kept informed. What people are not informed about, they often oppose. (Keeping people informed is one way to give them status as individuals.)
10. To have confidence in the group and leadership; confidence based upon the assurance of consistent, fair treatment and recognition when it is due.

Blue Chip Program

NOTE: The following Blue Chip Program was adopted in September 2001 and was developed to allow for greater flexibility and creativity in a chapter's development and implementation of a Plan of Action and a Final Report. Examples in this book relating to the Plan of Action, the Planning Guide for Chapters, and Programming Portfolios (Individual, Community, Management, International, and Business) should be used as sug-

gestions. The needs and desires of the membership in conjunction with the needs of the community and available resources should determine the contents of the Plan of Action. Creativity will determine the format of the plan and the format of the Annual Report.

BLUE CHIP is defined as "A consistently successful venture or enterprise. Something that is well-established in its worth and stability." Completing the Chapter Blue Chip program will help to insure that the chapter is consistently successful, is well managed, and is a stable organization.

The Chapter Blue Chip program is a planning, evaluation, and reporting process utilizing member and community input. When used properly, the Blue Chip program will help the chapter develop its members and impact the community.

CONTINUAL BLUE CHIP SUCCESS

Several levels of Blue Chip have been created to recognize chapters' continuous years of success. The different levels and requirements include:

BLUE CHIP: Chapters achieving the requirements listed on the Chapter Blue Chip Certification Form will be recognized as Blue Chip chapters for the first two consecutive years.

BRONZE CHIP: Chapters that achieve Blue Chip status for a minimum of three consecutive years will be recognized as Bronze Chip chapters.

SILVER CHIP: Chapters that achieve Blue Chip status for four consecutive years, with an extension completed within any one of the first four years.

GOLD CHIP: Chapters that achieve Blue Chip status for five consecutive years, following Silver Chip year.

DIAMOND CHIP: Chapters that achieve Blue Chip status for 10 consecutive years. Chapters must complete an extension between years six and 10.

PLATINUM CHIP: Chapters that achieve Blue Chip status for 15 consecutive years. Chapters must complete an extension between years 11 and 15.

DOUBLE DIAMOND CHIP: Chapters that achieve Blue Chip status for 20 consecutive years. Chapters must complete an extension between years 16 and 20.

HENRY GIESSENBIER CHIP: Chapters that achieve Blue Chip status for 25 consecutive years. Chapters must complete an extension between years 21 and 25.

Chapter Plan— Getting Started

The chapter plan is a series of activities to help the officers and members determine the direction the chapter should take in the coming year. This is actually 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 plan should be presented to the entire membership for approval and then implemented and evaluated on a periodic basis.

The chapter plan should identify the needs of the members, needs of the community, chapter strengths and weaknesses, long and short term goals, and anticipated problems and solutions. It should also include a calendar of events.

The components of the chapter plan are:

- A member survey
- A community needs analysis (survey)

Note: Complete the first two components before moving on to the others.

- A planning session
- A written chapter plan draft
- A calendar of events
- An organizational chart
- An annual budget
- An annual membership plan

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. The following are suggested:

- 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. Organize a calling committee to phone the members.

- Surveys can be conducted by visiting members. This is a particularly good option for a small 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.

A survey should also be conducted in the community by the Community Development Vice President or as a chapter project. This survey should be designed to determine community needs. Again, run this as a project in the community area.

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.

Just like the member survey, the community can be surveyed in a variety of ways. These can include:

- 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 to 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 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.

During the planning session, each officer responsible for an area of chapter programming should review 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.

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, 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 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 Junior Chamber 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 year's Plan of Action will serve the chapter in the same way a road map serves a traveler on a cross country trip. The following steps are essential:

- 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 Individual Development 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.

- 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.

- Briefly list the strengths of the chapter and what the Board has 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.

- 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.

- Divide the chapter plan by Area of Opportunity. Areas of Opportunity are categories that Junior Chamber activities are broken down into. 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. Areas of Opportunity are defined in the National Awards Manual section.

- Identify those projects that best accomplish the chapter's goals.

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. For example, to ensure the success of the Christmas projects, depending on their size, the planning should begin in August or September, not December 1.

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.

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 chapter 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 and payable at each Board meeting.
- 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 reimbursements take 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 a membership increase 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 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 (see the Membership Plan Form). 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 a good idea), the Board of Directors 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 for the year. Remember, new members are coming into the chapter throughout the year, and the plan must be adjusted for their needs as well.

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). The projects that have been 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? Either way, a review of the budget is important.

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 of Directors 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 in the chapter did for 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.

For further information on the chapter plan and awards criteria, see the Awards Manual. The chapter's Annual Report will be used as the basis for determining award winners for national awards, including the Howard, the Whetsell, and the Marks.

Board Member Training

Board member training covers many topics including: communication, team building, motivation/recognition, working with non-performers, how to follow up, and leadership seminars. It should not, however, be a one-time-only training session. The Board's education on leadership and management should be a year-long effort. Training will come not only from within the chapter but also from the district, region, and state organization as well.

Board member training can take various forms. Group training can cover many topics, and input can be used as grounds for discussion. One-on-one training is beneficial for some, and may be necessary if the skill level of Board members varies or schedules conflict. A variety of people are available to help with the training; state officers, for example, or professionals from the community.

Beyond the aspect of training members concerning their responsibilities, needs should be determined based on levels of experience. Newer Board members may need discussion about dealing with difficult members or handling members who are constantly negative. The Board member who has been around longer may require only a brief refresher course. There are other benefits to Board member training. Team-building, for example. After members get to know each other, they are likely to see each other as partners in success and stand together in support of chapter issues.

Finally, when Board members have been trained, they can accomplish more, chapter goals are clearer to them, and they have a better understanding of the overall picture from members, to community, to the future of their chapter.

Suggested Agenda for Board Training

Training can be given throughout the year. Officers must first be trained on the chapter's purpose, the chapter plan, and their own responsibilities to ensure that the chapter gets off to a good start. Use this outline as the basis for the training. Each heading is followed by a concept or result that officers should understand. This agenda can be covered over several training sessions. Don't hesitate to ask any state officer to help in training the Board. More information on these topics can be found throughout *The Book 2002*.

A. History and Purpose of the Organization — The better the Board understands the history and purpose of the organization, the better equipped it will be to manage the chapter and ensure that members receive maximum benefit from their membership.

1. Founding of Organization

2. The Jaycee Creed — A statement of philosophy and beliefs adopted by the U.S. Junior Chamber and JCI. The Creed was written by C. William Brownfield of Columbus, Ohio.

3. Purpose of Member — The purpose of the member is to devote a portion of his or her time in service to the community resulting in his or her development as a leader by learning leadership skills through doing. The Board should understand this purpose in order for it to properly plan for and manage the chapter.

4. Purpose of Chapter — The purpose of the chapter is to create an atmosphere in which the member can receive the benefits of membership. The Board members should always keep this in mind as they carry out their duties.

5. Purpose of State Organization — The purpose of the state organization is to help chapters fulfill their purpose. This is why the assistance of assigned state officers is so important to the chapter. They are there to help.

6. Purpose of National Organization — The purpose of The United States Junior Chamber is to create and foster the growth of member organizations (state organizations and chapters) throughout the United States. The Board members should understand that the organization and its influence reaches beyond their community and state. Junior Chamber chapters are making a difference across the nation.

7. Purpose of International Organization — The purpose of Junior Chamber International is to create and fos-

ter the growth of member organizations throughout the world. Again, the Board should know that the Junior Chamber is not limited to the United States. It has made an impact in more than 120 other countries and territories, including Eastern Europe.

B. Total Junior Chamber Concept — The Board should understand that having a balance of programs and projects in each of the Areas of Opportunity (Business, Management, Individual, Community, and International) increases the chance that they will attract more members; more members will benefit; the chapter will be more active in the community; and the chapter purpose will be easier to achieve.

1. Business Area of Opportunity — This area provides the opportunity to the individual member to contribute to the development and enhancement of the economic infrastructure, prosperity, and well-being in all nations.

2. Management Area of Opportunity — This area develops the managerial skill of the individual member by offering training and actual experience as a leader at all levels of the organization.

3. Individual Area of Opportunity — This area provides the opportunity for the individual member to realize his or her personal potential through training programs.

4. Community Area of Opportunity — This area develops the sensitivity of the individual member to societal problems, and knowledge of community dynamics in solving these problems, through actual experience.

5. International Area of Opportunity — This area provides the opportunity to the individual member to contribute to the development of goodwill, understanding, and cooperation among all peoples.

C. Chapter Planning Guide — The Board must understand the elements of the chapter plan, who's responsible for it, and why it's important in order to use the plan to ensure service to the community and opportunities for the members to derive benefit from the organization. See the Chapter Plan section previously discussed for further information.

D. Board Member Responsibilities — The Board members should understand that they will lead by doing, and that by merit of their office, they are not only responsible for their areas, but the total chapter operation as

well.

1. Job Descriptions

2. Provide Management of Chapter — All officers are responsible for the following:

Member Development. To ensure the member has an opportunity to derive the benefits of membership. This includes making sure members are informed of events and opportunities.

Fiscal Development. To ensure the finances of the chapter are maintained to assist in fulfilling the chapter purpose. This not only means being knowledgeable about chapter finances, but working ways-and-means projects, etc.

Chapter Growth. All Board members should be knowledgeable in recruiting techniques and actively recruit as well as train others to recruit. However, these mechanics of growth and recruiting cannot replace the ability of the chapter to attract and retain members because of the chapter's quality activities and prestige in the eyes of the members and community.

3. Chapter Representation — All officers are responsible for maintaining a positive image within the community, district, region, and state, ensuring the public knows about the chapter and the work it does.

4. Duties — Officers are responsible for two broad categories of work — administration of the chapter and member involvement. The latter is by far the most important.

E. The Active Jaycee — Officers should know what members expect in order to help with member training and orientation. Chapter activities fall into four basic areas, all aimed at encouraging member participation as a means by which members and the community gain benefit.

1. Meetings — Inform member of activities and projects, voice in affairs of chapter.

2. Projects — Develop skills, fellowship with others, serve community and chapter.

3. Recruiting — Bring in new members to foster new ideas for chapter activities and growth.

4. Socials — Encourage member development and further member and chapter goals.

F. Project Participation — The number-one responsibility of Board members is to recruit and train project chairpersons. This is how the Jaycees provide leadership training. Project participation by members is the most

important indicator of success the Board has. If members participate, then the Board has chosen the right projects, chairpersons, and committees. Officers must participate in the recruitment of participants and promotion of chapter activities.

1. Chapter Fundamentals Video — Board holds video parties to share with the chapter the seven steps to effective chapter management.

2. Chairperson — Recruiting and training committee members for projects within officers' areas.

3. Committee — Assisting committees with training and guidance in accomplishing stated goals.

4. Member Participation — Promotion of chapter activities to members.

Build a Winning Team

A Chapter President's success is directly related to the input of the individuals on his or her team. Building a winning team takes planning, training, and a personal touch. The best way to build a team is to start with the Board of Directors, the most immediate team.

Ideas for building a winning team are:

- Utilize local newspapers for hot community topics.
- Use brainstorming sessions to discuss new ideas.
- Analyze how other Jaycees are achieving success on the chapter, district, and regional levels.
- Work with State Program Managers and use Individual Area of Opportunity programs.
- Train teammates concerning how to get optimal results.
- Conduct separate meetings away from chapter meetings to generate new ideas.

Retreats can be a useful way to get team members better acquainted with each other. Activities that can be accomplished on a retreat include:

- Planning sessions.
- Fun/work sessions.
- Board meetings.
- Evaluation of the chapter plan.

Retreats can be held anywhere, but they work better if a "special" place is secured, with limited distractions, such as a hotel or campground.

Idea sessions allow people to speak their minds. Brainstorming at these sessions brings new ideas to your team. Idea sessions can:

- Give team members an informal discussion setting.
- Help the team develop a theme or major area of discussion.

- Provide a place where everyone’s ideas must be respected and where everyone may contribute.

Socials are a good way to develop the team while bringing families together. Ideas include:

- Picnics.
- Football games.
- Potluck suppers.
- “Bring your own munchies” parties.
- Christmas/holiday parties.
- “Non-holiday” parties.

In order to build a winning team, the President must recognize that people do things for their own reasons. When people feel that the ideas and responsibilities are theirs, they will work harder to see that projects are successfully completed. Members should be given specific responsibilities and the authority to carry them out. In this way, chapter goals become personal goals.

Communication must be established within the chapter. Chapter Presidents must ensure that every member of the team understands the responsibilities of the others. When problems arise, strong lines of communication are critically important in the search for quick and effective solutions. An organizational chart is a helpful communication tool.

Resources are needed to ensure project success. The President should work through members to see that every available resource is utilized.

Proven techniques for team building are important for a winning chapter. The following techniques are essential:

- Get to know the members
- Consider each member and each job important
- Establish a common goal
- Establish a common identity
- Ask for advice
- Listen to and respect opinions
- Provide meaningful assignments
- Tell members what is expected of them
- Provide training
- Provide recognition
- Praise efforts
- Provide constant communication
- Encourage involvement
- Provide job descriptions
- Provide a special identification for officers (team shirts, nametags, special seating at meetings)

Goal Setting

The job of any leader includes planning. The goals set as a chapter leader need to be specific and measurable enough to be easily analyzed. This allows progress, or the lack of it, to be measured and necessary adjustments made.

The Chapter President should sit down with his or her team to set chapter goals. The planning process should be explained to the team, and team members should be asked to submit ideas. The result should be a consolidation of ideas in which each team member feels a sense of ownership.

The planning process unlocks the door to better projects and personal growth. Everyone is afforded the opportunity to become a good manager. In addition, a good manager prevents oversights and provides checks and balances to ensure the project is conducted properly.

Team members should be encouraged to enter into the planning process and their ideas should be honestly evaluated. This is how personal growth takes place. Concentration on ambitious, long-range goals can be of great benefit to the chapter and to the individual. The key is to provide appropriate guidance and training.

Realistically speaking, all the planning in the world doesn’t mean a thing unless team members are willing to work hard to make their plans happen. The smallest plan carried through to completion is a thousand times better than the greatest intention in the world. Walt Disney said it best: “The secret to success is simple...you get it by working!”

Communication

Approach #1

Chapter President: We missed you at the last few membership and Board meetings. You know how much we count on each officer for the success of our chapter.

Chapter Officer: I’m sorry, honest!

President: It’s especially tough on the members and other officers when we don’t know what to expect. When you don’t call me, I don’t know whether you are just taking a little vacation or you’ve quit.

Officer: Yeah, I know. I haven’t been myself lately.

President: I called your house but didn’t get an answer. Your participation has been good in the past so I hope you will start performing again. I’m not going to replace you now, but I will if you don’t come around.

Officer: Thanks, I’ll do my best.

Approach #2

Chapter President: We've missed you at the last few membership and Board meetings. Sit down and let's talk about it. Been under the weather or something?

Chapter Officer: Guess I'll be all right.

President: You don't sound too sure.

Officer: I've just got to keep going. Hope I can stay awake on the job at least.

President: Been losing sleep?

Officer: Yeah, my head's just spinning. Judi's been in the hospital for two weeks. I didn't tell anyone about it because I didn't want to make that an excuse. I've been bouncing between the hospital, work, and home, trying to keep an eye on Tammi and Chad in the meantime. The doctors say Judi will be OK, but I still have to make arrangements for the next week or two until she's well enough to come home.

President: Wow, I'm really sorry. I didn't know; no wonder you haven't been around. How can we help?

The second approach is obviously the more caring and empathetic of the two. It shows a better communicator at work.

Listening is essential when working with people. There may be personal problems no one knows about. The Chapter President should take a personal interest in the members of his or her local chapter, and be careful to hear what those members are saying. Listening to and understanding the reasons for negative attitudes can answer questions and solve misunderstandings before they become open conflicts.

A good communicator is a patient listener. He or she can show acceptance, not necessarily agreement, by nodding and saying, "I see." A patient listener honors the speaker by focusing his or her complete attention on what is being said, and resisting the urge to interrupt. Questioning facts or being argumentative will most often cause the speaker to "clam up."

A good communicator can elicit more detailed information from the speaker by asking carefully phrased questions. He or she should also be conscious of what isn't being said.

The Chapter President can facilitate good communication in chapter members by encouraging them to listen carefully and engaging the group in a pop quiz at the end of the session to see if the information was successfully communicated.

The Chapter President can also encourage note taking. The most difficult aspect of note taking is producing

something that can actually be understood later. Members should be instructed to make each note a complete sentence, while only taking down the important points. Notes should be reviewed soon after the meeting, visualizing how the thoughts were used.

For the effective leader, good communication is essential. It takes constant attention and effort, but it will produce results.

The following checklist can be used to evaluate personal listening skills:

- I wait for my turn to talk.
- I look for opportunities to sincerely compliment others.
- I am aware of the importance of listening in my daily life.
- When someone speaks to me, I give my full attention.
- I assume every person has something worthwhile to say and I am anxious to understand.
- I listen past the words of people I work with and try to see their feelings.
- I take notes (using complete sentences) to be sure I understand the message.
- I ask questions designed to produce the answers I need.
- I use language the people I work with can understand.

Delegation

Delegation is the act of empowering someone to carry out a responsibility for which another is ultimately responsible. Delegation should take place:

- When a project is behind schedule.
- When handling the details of one project prevents completion of greater responsibilities.
- When the project chairperson is overwhelmed.
- When there is a breakdown in communication.

Delegation is not easy to learn. The following are mental road blocks that make it difficult to delegate:

Failure to consider the benefits of delegation. The President will have time to concentrate on pressing matters once he or she recognizes the talent that is available in the chapter.

Reluctance to share the credit. Some Presidents like to be known as workhorses. In the business world, these people believe this guarantees job security. It doesn't! Some Presidents may fear that those members assuming some of their duties will be more successful than they

have been. These individuals have missed the point. They must change their attitudes or continue to live with debilitating insecurities.

Fear that delegated work will not get done, or won't be done properly. These Presidents are typical perfectionists. They must realize that others deserve the opportunity to hone their skills and learn from their mistakes.

Doubt that he or she can adequately train others. Who better to train another individual than the President who has already carried out a number of successful projects.

At times, it is difficult to find members who are willing to take on delegated responsibilities.

Some members have their own agendas. These members may have joined the Junior Chamber so they can add it to their resume. They aren't interested in taking on additional responsibilities. Successful Presidents will avoid hounding and help the members identify areas where they will enjoy getting involved.

Some members say they are too busy. This may be true. Presidents may need to provide time management techniques.

Some members may lack the motivation to get involved. Plaques, awards, and public appreciation are good incentives for participation. Take time to explain goals and convince members to reach them. Presidents must get to know their members and learn what will provide personal motivation.

Successful Presidents will let members know what needs to be done and show confidence in their abilities. The President will find ways to let members know how important they are to the chapter's success. These Presidents have learned that delegating means giving others the chance to grow and they make it a top priority. Delegate for everyone's sake!

Delegation Effectiveness Checklist

- Always provide complete information on policy and procedures as it relates to the assignment.
- Precisely define the limits of responsibility before delegating.
 - Follow up to see how the job is being done.
 - Explain the project and answer questions, but don't take over the decision-making process.
- Develop initiative in others so they can handle emergency situations on their own.
 - Correct errors through explanation rather than criticism.
- Correct others privately and allow changes to be

made independently.

- Teach others how to find answers on their own.
- Be supportive.
- Take responsibility for delegated decisions.

Effective Meetings

Chapter meetings are the primary means of communicating with members. Meetings of the Board of Directors are different in that they provide an in-depth review session designed to analyze where the chapter has been, where it is going, and why.

Board meetings should be used to prepare for membership meetings. The agenda, officer reports, membership dues, the calendar, etc., should be reviewed at the Board meeting so that a report can be given during the membership meeting.

In short, committee work is handled during the Board meeting. Results are reported to the members at the membership meeting. The membership meeting is an opportunity for members to be heard and chapter business to be discussed.

In both cases, the President should be a totally impartial individual ensuring that all the organization's business is transacted as fairly and efficiently as possible. Once a leader shows partiality to any individual or group of individuals, or any issue, the leader loses the respect of the membership.

The President's attitude toward meetings is contagious. If he or she is confident, prepared, and shows good humor, the members will follow his or her example. Common sense is an important asset. The President is not expected to have every answer to every problem that presents itself. In those situations, he or she must depend on common sense and handle the situation fairly.

A GUIDE TO SUCCESSFUL MEETINGS

A membership meeting is a regularly scheduled chapter activity that is called to:

- Transact chapter business.
- Inform members of chapter activities.
- Solve specific problems.
- Award/recognize contributions made by the members.

Meetings are important to the life of the organization because they are an important means of communication and give members an opportunity to share ideas and express opinions. They serve as a valid social outlet and

teach respect for the will of the majority, leadership techniques, and decision-making.

Planning the meeting

The meeting room should be centrally located, large enough to accommodate the members, well-ventilated, and provide adequate lighting. The President should know:

- The location of heat and/or air conditioning controls.
- How to reach the janitor.
- The location of light switches.
- The name and home phone number of the person who will be opening the facility.
- The location of the restrooms.
- The location of the telephones.
- The location of the emergency exits.

Promoting the meeting

Promotion activities can greatly enhance meeting attendance. The President should:

- Include a short article about the next meeting in the chapter newsletter, stating the time and date of the meeting, directions to the meeting location, expected project reports, and prospective awards.
- Ask the Publicity Chairperson to submit an announcement of the meeting to the local newspapers, radio stations, and television stations about two weeks before the meeting.
- Ask the Chapter Secretary to send a reminder to members in the form of a simple pre-printed postcard about one week before the meeting.
- Ask Board members to follow up with telephone calls when possible.

Preparing for the meeting

Successful Presidents take time to prepare. The President should:

- Know the basics of parliamentary procedure and see that the Parliamentarian or Legal Counsel is also versed in the rules.
- Be mentally and administratively prepared to conduct an efficient meeting. The agenda should be finalized at the preceding Board meeting.
- Ensure that copies of the agenda and all hand-outs are available for each member.

Programs for the meeting

A short program can add value to meetings. The President should consider using:

- A local businessman demonstrating his or her product or service.
- A local banker explaining the banking services offered by a local institution.
- A member from another chapter detailing a program that chapter is successfully conducting.
- A local politician explaining issues relevant to the members.

The President should consider scheduling mini-programs from the Individual Development series. These can be short, interesting, and fun. Use a participation or role-playing segment of the program. Those who are interested in going through the entire program will then have a better understanding of what it offers. This may improve attendance at Individual Development programs the chapter conducts.

Participation at the meeting

Make sure members and guests feel welcome. The President should:

- See that members and guests are greeted warmly.
- Seat an older member next to a new member or guest to offer explanations when necessary.
- Draw every member, whether old or new, into the discussion.

Preparing the place for the meeting

The President should:

- **Arrive early.** The President should be on site at least one hour before the meeting to see that everything is set up properly. If the door to the hall is locked, it's better to know an hour early than five minutes before the meeting is to start.

- **Appoint a set-up committee:** The President should appoint two or three non-board members who will share the responsibility for setting up each meeting. They should also arrive early. It is best to rotate the following assignments:

- Set up the head table
- Put up the Creed banner, flag, and lectern
- Set up the greeting table
- Set out any display materials or posters
- Sweep and tidy up the room, if necessary
- Check microphones and other equipment

The President should thank the set-up committee dur-

ing the meeting.

• **Assigning a head table:** For most meetings, the President, Vice Presidents, Secretary, Treasurer, and any state officers or guest speakers should be seated at the head table. The arrangement is at the discretion of the President with consideration of the following general rules. As you face the audience:

- Guest speaker to immediate right of lectern.
- Chapter President or master of ceremonies to immediate left of lectern.
- Highest-ranking Junior Chamber officer to speaker's immediate right.
- Highest-ranking non-Jaycee, other than the speaker, to emcee's immediate left.
- People of equal rank seated at equal distance from lectern to left and right.
- Guests of equal rank seated alphabetically.
- Those seated at head table should be notified well in advance and informed of proper attire.
- If meeting is formal, line up head-table seating off stage and then seat them together.
- Alternate "outsiders" with Jaycees, this will liven up conversation.

• **Assembling a hospitality table:** At each meeting, the President should plan for an official hospitality table and greeters to welcome all prospective members at the door and give them the following:

- A nametag
- A copy of the agenda and handouts
- A membership application
- Any other Junior Chamber information the chapter wishes them to have

The President should ensure that new and/or prospective members are introduced to as many Board members and general members as possible. If possible, a "buddy" should be assigned.

Pre-meeting orientation

An excellent way to orient guests and new members and expedite meetings, is to have a pre-meeting orientation session. The President should:

• **Appoint an orientation team.** Past Presidents are a good source for this assignment. They should arrive one-half hour before the meeting is scheduled to begin. As guests approach the hospitality table, they can be identified and taken to a separate room for a 15-minute orientation.

• **Cover only the meeting:** In-depth information about the Junior Chamber can be given after the prospect joins. If the President conducts this type of pre-meeting orientation, he/she should recruit approximately 90 percent of these prospective members attending the meeting.

Producing a winning meeting

The President should:

• **Ensure that his or her conduct is exemplary.** The President should always present a professional appearance and run the entire meeting as efficiently and professionally as possible.

• **Start on time.** Even if the President and the set-up committee are the only ones there, the meeting should begin on time. Members will eventually get the message and follow the example the leadership sets for them.

• **Follow the agenda.** This will keep the meeting moving.

• **Welcome all guests.** Guests and prospective members should be introduced immediately after the Pledge of Allegiance.

• **Introduce the speaker.** An introduction should be prepared for every guest speaker.

• **Notify officers of reports to be given.** The President must ensure that those giving reports are notified in time to prepare and are aware of time limits. Reports should be given from behind the podium. If a report runs over its time limit, the President can simply stand up beside the speaker, thus allowing the speaker to wrap up the report without embarrassment.

• **Never resort to anger.** The President should always be a diplomat. If a member's comments are out of order, the President must respond firmly but politely. If the speaker is interrupted, the President must point out who has the floor. Belittlement and sarcasm are inappropriate. The President must depend upon parliamentary procedures and common sense.

• **Close the bar.** If a bar is available to members, it should be closed while the meeting is in session and reopened after adjournment.

• **Make use of meeting checklists.** The President should make use of the following checklists.

MEETING CHECKLIST

Before the Meeting:

- Is there a definite purpose for the meeting?
- Has the agenda been planned and copied?
- Have minutes of the previous meeting been mailed to

members or are they available at the hospitality table?

- Do officers and chairpersons understand what they are expected to do?
- Has notice of meeting, time, and location been given to members?
- Have guest speakers and VIPs been contacted and the following discussed:
 1. What subject is to be covered?
 2. What is the time limit of the speech?
 3. Where does the speech fit into the overall agenda?
 4. Who will cover expenses, transportation, room?
 5. Who will meet the guest speaker and VIPs?
 6. Is there information for an introduction?
 7. Are spouses invited?
- Have arrangements been made for audio-visual equipment?
- Have arrangements been made for a back-up guest speaker?
- Has the meeting room been arranged appropriately?
- Has a gift been arranged for the guest speaker and VIPs?
- Has engraving and/or lettering of awards been done?
- Will there be refreshments and are they arranged for?
- Will the media be in attendance?
- Will name tags be needed and/or other identification for members and guests?
- Have arrangements been made for a Creed banner, flag, and podium?

At the Meeting:

- Is there someone to greet members and guests?
- Will the meeting start on time?
- Are there name tags?
- Are there place cards?
- Is the room arranged correctly?
- Are officers and/or chairpersons prepared for brief reports?
- Are there awards?
- Is there water service (water and glasses) for the head table?
- Have the people who are to be seated at the head table been notified?

After the Meeting:

- Have thank-you letters been sent?

- Has important information been sent to the media?
- Have the minutes been prepared?
- Has the President completed all follow-up on commitments or promises?
- Has the President evaluated the success of the meeting and answered the following questions?
 1. Was the agenda followed?
 2. Were minutes taken?
 3. Was action taken on needed items of business?
 4. Was there adequate follow-through?
 5. Were the members aware of questions addressed and decisions made?
 6. Was the opportunity given to members to comment on decisions?
 7. Was the program or guest speaker effective?

Increasing Attendance and Fun at Meetings

The easiest way to increase attendance at meetings is to ask members to handle responsibilities at the meetings. The following are suggestions. (Note how many of these qualify as Speak-Up ideas!):

- One member should be asked to offer the invocation, another to lead the Pledge of Allegiance, another to give the benediction, and another to lead the Jaycee Creed. Yet another member could be asked to bring the Creed and chapter banners.
- Several members could be asked to serve as meeting greeters. They should arrive early and welcome all attendees, invite them to sign in, and give them a meeting agenda.
- Several members could be asked to introduce guests who are attending.
- One member could be asked to prepare a five-minute presentation about the occupation of another member. This encourages networking and could be called **“Meet the Member.”**
- Use the **Secret Handshake**. Prior to the meeting the President secretly asks one member to be the Secret Handshake person. As members arrive, everyone shakes hands. The secret person remembers the 15th person who shakes his or her hand. During the meeting, the President identifies the Secret Handshake person and the 15th person is revealed and presented with a prize.
- Certificates, awards, or prizes could be presented to members who have perfect meeting attendance during a quarter or during the year.
- The names of members who attend during the entire year could be placed in a hat — each member should be

given one entry for each meeting he or she attended. At your Awards and Installation Banquet, draw a name and award a large prize.

- A \$10 prize could be awarded at each meeting. The chapter should advertise both the winners and losers as well as the amount in the jackpot in the chapter newsletter.

- Music could be played at meetings, especially when awards are being presented.

- Themes such as Calypso night, Mexican night, etc., are effective.

- Provide refreshments.

Board Meetings

Board meetings are important because they give the President an opportunity to regroup the team and keep it heading in a unified, positive direction. How well the President guides and prepares the team at a Board meeting will be evident at the following membership meeting. The President should:

- Plan the Board meetings as carefully as he or she plans the membership meetings.
- Monitor, review, and discuss the yearly plan at each Board meeting.
- Changes, deletions, or additions to the yearly plan should be implemented at Board meetings.
- Provide time for each project chairperson to present the planning questions for the Chairman's Planning Guide (CPG) for each proposed project for Board review and approval. Once Board approval is granted, time should be provided for each project chairperson to report on the projects status. When the project is completed, time should be provided for the chairperson to present the completed CPG (final report) to the Board for approval.

Key elements of productive Board meetings are:

- **An agenda.** A complete agenda should be prepared before each Board meeting, and copies should be given to everyone attending the meeting. They should be mailed in advance, if possible.

- **Parliamentary procedures.** These procedures should be followed when business decisions are being made for the chapter. Board meetings may be kept informal, but all decisions should adhere to good parliamentary practices.

- **Respect for Board members' time.** Business should be transacted quickly and efficiently. Brainstorming and

creative sessions should be placed at the end of the agenda and committee business should be handled in committee meetings.

- **Board member reports.** Every Board member should prepare a report at each meeting. Board members should be instructed in advance concerning reporting expectations and time limits. Participation by all stimulates unity.

- **New member review.** Assigned Board members should report on new members and cover such things as where they work, what they want to do in the chapter, and why they joined.

- **Member review.** Board members should review such things as billing for the next month, member attitudes, when members were last contacted personally, and what action is needed to ensure they will renew. This procedure should ensure that members' needs are being met.

- **Attitude reports.** Board members assigned to individual members should give a report on the general attitude of assigned members. Trends should be noted. Positive trends should be capitalized on and problems should be dealt with before they become unmanageable.

- **Plan of action review.** Board members should address where the chapter is in relationship to the chapter plan. Are new projects effective? Should the chapter drop or reschedule any projects?

- **Preparation of membership meeting agenda.** Board members should be included in the agenda preparation process, thus clarifying expectations and responsibilities. Chapter business should be reviewed and unified positions established.

- **Creative time.** Time should be scheduled at the end of the meeting for creative brainstorming with Board members, emphasizing new ideas, approaches, and solutions.

The success of membership meetings can be measured in direct proportion to the success of the Board meetings that precede them.

The importance of the Board and membership meetings to the overall success of the chapter cannot be over-emphasized. A well-planned and well-run meeting may not be the reason for a member to attend, but a disorganized and inefficiently run meeting is a legitimate reason for members not to return.

The successful President will bring Board members into the planning process. He or she will seek input from the Board when addressing important or controversial issues and ask Board members to help handle problems

between members that may negatively impede the progress of a meeting. The Board ensures that each membership meeting is a productive one. The President just happens to be the one selected to stand behind the lectern and expedite the business of the chapter.

Board members should be held accountable, both personally and corporately, for carrying out the chapter's goals and responsibilities. The President should be fair, but firm, assisting each member with his or her weak areas, and moving members toward the accomplishment of the chapter's goals. The best place for this to be done is at a Board meeting.

At both membership and Board meetings, the President will be called on to make difficult and controversial decisions. Let the following be a guide when those decisions have to be made: *"If it's best for the majority, do it; if it's best for the minority, don't do it."*

Parliamentary Procedure

Parliamentary procedure is simple in principle and based on common sense and courtesy. It seems technical because it has been necessary to develop a special vocabulary for discussions. Once the vocabulary becomes familiar, the rules will flow easily. Becoming comfortable with parliamentary procedure is vital for the Chapter President. The purposes of parliamentary procedure are:

- To enable an assembly to transact business with speed and efficiency.
- To protect the rights of each individual.
- To preserve a spirit of harmony within the group.

The President or Parliamentarian may secure a copy of *"Robert's Rules of Order"* through the Products Department. The five basic principles of parliamentary procedure are:

- Only one subject may claim the attention of the assembly at one time.
- Each proposition presented for consideration is entitled to full and free debate.
- Every member has rights equal to every other member.
- The will of the majority must be carried out, and the rights of the minority must be preserved.
- The personality and desires of each member should be merged into the larger unit of the organization.

The Order of Business

It is customary for every group to adopt a standard order of business for meetings. When no rule has been adopted, the following is the order:

- Call to Order
- Reading and Approval of Minutes
- Reports of Officers and Standing Committees
- Reports of Special Committees
- Old Business
- New Business
- Program
- Adjournment.

All actions taken by the Board of Directors should be voted on in the form of a motion and the results duly noted in the minutes of the meeting.

New Member Orientation

One of the first activities new members should be asked to attend is the new-member orientation. This is a key component of the Jaycee experience. When an orientation is provided for new members, they are more likely to become active in the chapter and more likely to renew their membership.

There are many different ways to orient new members. The chapter may conduct a formal training program and give each new member a packet of information about the chapter. The new member packet should, at a minimum, include a chapter calendar, brief history of the chapter and explanation of the chapter's major projects, a chapter roster and a copy of the most recent chapter newsletter. A social activity may be planned, giving the new member an opportunity to meet other members, both old and new.

An excellent new-member orientation program called *"It's All Greek to Me,"* is available through the National Service Center.

The following is a suggested outline for a new-member orientation:

A. Welcome and Introductions

All members at the orientation, new and existing, should stand and introduce themselves. They should be encouraged to share personal information about their jobs and families as well.

B. History of the Junior Chamber Movement

Historical information about the Junior Chamber movement should be discussed.

C. History and Background of the Local Chapter

The orientation leader should present a brief histo-

ry of the local chapter, including when the chapter was founded and projects completed in the community.

D. Structure of the Local Chapter

The orientation leader should outline the organizational structure of the chapter, explaining the role of the Board of Directors as well as the general member.

E. Projects

The orientation leader should briefly describe projects that are currently being run by the chapter and explain briefly the CPG process.

F. Getting Involved

The orientation leader should describe how new members can become involved in the chapter through membership meetings, the chapter newsletter, phone calling trees, etc. Encourage them to get involved in a project quickly.

G. Question and Answer

The orientation program should last no more than an hour. The new member is being given a great deal of information in a short time and should not be overloaded.

Idea: Once the new member orientation has been completed, take that group of new members and brainstorm about a project idea with them. Appoint a chairperson, help the committee write a CPG, and assign a “mentor” to help the new members run their first project.

Note: New members that are activated in this way, working on their own project soon after they join, will renew their membership almost 100 percent of the time and often become the future leaders of the chapter.

Mid-Year Review

It's the end of June and the chapter has been humming along, running great projects, activating old and new members, and bringing new individuals into the chapter.

Now is the time to sit down with the Board of Directors and thoroughly review the chapter's plan of action and budget for the remainder of the year. What were the goals at the beginning of the year? Are they still realistic? Is there enough money in the budget to meet chapter expenses for the rest of the year? Is the chapter on track in the membership area to finish the year at growth?

There are many ways to accomplish a review of the chapter's plan, but probably the best way is to set aside a block of time, ideally in a location free from distraction and chapter activities, and sit down and go through the chapter plan goal by goal and evaluate it. Each individual

who is responsible for any part of the plan should prepare for this review by scrutinizing each project run in their area to see if project goals are being met, thus meeting chapter goals. Then these individuals should bring to the review meeting an up-to-date summary of activity in their assigned area.

As each area of the chapter is discussed, the group as a whole should determine whether or not goals for each area should be revised to reflect past and upcoming activity in the chapter.

An important part of a mid-year review is to determine if chapter programming is still meeting the member's needs. Hopefully, at the beginning of the year, a member survey was completed to determine what type of programming was relevant to the membership. It is a good idea, also, to survey the membership at mid-year to see if the programming offered is what the membership wants. It may be found that what was once a popular project may no longer be of interest to the members.

Another important piece of the mid-year review is evaluating the chapter's budget. If first-half fundraisers were not as successful as expected, it may be necessary to reduce or delete projects from the plan. If fundraising has been better than expected, additional programming and services can be added to the plan. However, without a clear picture of the chapter's finances, the chances for overall success diminish.

An additional benefit of the plan review process is team building. It is an opportunity to bring the Board of Directors together, refocus, and accomplish the goals set at the beginning of the year.

A chapter plan is fluid. There is no reason why a goal cannot be adjusted to reflect activity, good or bad. By thoroughly evaluating the chapter's plan at mid-year, and determining what it will take to meet the chapter's goals by the end of the year, the chances for success are that much greater. Not being able to meet a chapter goal is not a failure, just a reflection of circumstances that may or may not be out of your control.

Take the time to review your chapter's plan and make sure the chapter is on the road to success.