



# The Book : Chapter Officers

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## Officer Orientation

The role of chapter officers is to serve as a voice for the general membership and consolidate the energy of the members and community to achieve preset goals.

The job descriptions in this section of *The Book 2002* are intended to serve as guidelines. Each chapter will determine what each officers' specific responsibilities will be.

Because of the intricate set of local, state, and federal laws governing not-for-profit organizations, The United States Junior Chamber recommends that office holders, either through qualified legal counsel or knowledgeable private legal counsel, fully understand the applicable laws and subsequent officer liabilities.

Every officer, regardless of position, is responsible to:

- Personally recruit and promote recruitment of new members.
- Report to the supervising chapter officer on a regular basis and work toward achieving the overall goals of the chapter.
- Attend all chapter Board and membership meetings.
- Attend district, region, and state meetings and training sessions.
- Communicate regularly with members as to their needs and requests.
- Actively participate in the Degrees of Jaycees Program.
- Assist the chapter in attaining Blue Chip status.
- Assist with the affiliation of new chapters.
- Uphold the Bylaws of the national, state, and local organization. Advise the President of inappropriate activity and/or violations.
- Actively participate in the decision-making process of the chapter.

*LOCAL PRESIDENT: PLEASE MAKE SURE TO COPY AND DISTRIBUTE THE APPROPRIATE SECTIONS OF THIS BOOK TO CHAPTER OFFICERS.*

## Chapter President Job Description

**THE OFFICE OF PRESIDENT** is a continuous position. It was there before the current President was elected and it will be there for his or her successor. Part of the role is to review activities of previous administrations and improve conditions and activities for the future of the chapter.

**The President is the chief executive officer and the guiding force in the chapter.** He or she presides over the Board of Directors and the membership and ensures that the Board acts in concert with the desires of the membership. He or she leads the chapter in a manner that will successfully blend community needs and the needs of members working together for mutual benefit.

**The President is assisted by the chapter's Board of Directors.** By nature of the position, the President will be perceived as being responsible for every detail, every action, every success, and even the failures. However, he or she is not alone! The Board will be of invaluable assistance.

The Board of Directors consists of the Chairman of the Board, Vice Presidents, Treasurer, Secretary, Legal Counsel, State Director, Directors, Chaplain, and Parliamentarian. Together, the President and the Board of Directors set policy for the chapter, taking their direction from the membership.

**The President executes policy through the offi-**

**cers and committee chairpersons.** He or she should define, in writing, the precise authority and responsibility each officer, director, and committee chairperson is given in order to ensure that they are fully trained for their jobs. Board members work with the President, but not for him or her. The President and members of the Board should be respectful of the other's authority and responsibility so that together they can focus on producing a healthy and successful chapter.

**The President coordinates, inspires, and teaches.** The Board is the servant of the membership. The role of a Chapter President is to serve as the chief executive officer of the local organization, handling administrative and personnel management and implementing the directives of the Board of Directors. As the leader of the local organization, he or she also serves as a member of the state organization Board of Directors, and the regional and district Boards, representing the views of the chapter.

**The President should make a point to know the chapter Board of Directors personally and professionally, especially regarding their Jaycee goals and backgrounds.** In the same way, the President should share his/her goals for the year and beyond with the Board.

**The President should call together the full Board for the purpose of constructing a chapter plan.** This will help Board members secure a clear understanding of what is expected of them including communication with the chapter officers for which they are responsible and the results of each activity in their area.

**The President should work hand-in-hand with the Treasurer to ensure the chapter is fiscally sound.** He or she should also work closely with the Secretary to ensure chapter records are in order and with the Vice Presidents to ensure that programming meets the needs of members, the chapter, and the community.

**The President should preside over Board meetings, guiding the discussion on chapter business and the well-being of the membership.** Membership meeting agendas are prepared at this time, so officers will know what is to happen and what will be expected of them.

**The President should make use of the talents and abilities of the officers by delegating tasks and authority rather than trying to handle every detail personally.** He or she should follow up as necessary, but it is vital that officers know when they are in charge, they are "in charge."

**The President will represent the needs of the members of his or her local chapter by serving on district, regional, and state Boards.** He or she should

understand all issues to be voted on.

**The President should serve as the chief public relations representative for the chapter in the community and must behave professionally as befitting a chapter leader.**

**The President encourages involvement and leads by example, getting to know members, recruiting new members, and becoming personally involved in chapter projects.** He or she should share information through newsletter articles, taking care to see that all members are adequately informed. He or she should tend to problems as they arise and ensure their resolution.

**The President should lead the chapter in a manner that will fulfill its purpose to create an atmosphere in which the member can receive the benefits of membership, the image of the chapter is enhanced, and members of the community receive assistance through activities that show positive results.**

*NOTE: PLEASE COPY AND DISTRIBUTE THIS SECTION TO ALL CHAPTER VICE PRESIDENTS.*

## **Vice President Responsibilities**

The role of the various Chapter Vice Presidents is an essential one.

**Vice Presidents serve as the team coaches and trainers for the Directors assigned to their areas.** As team coaches, the Vice Presidents should develop friendships with their team members, get to know them, how they want to be involved, and listen to their input. The successful Vice President should be a good facilitator and mentor.

Vice Presidents assist the chapter by assessing the needs and interests of the members, reviewing prior year chapter plans for their areas, and developing (with the help of their teams) a plan of action for their areas in the coming year.

Vice Presidents should work with other members of the executive team (President, other Vice Presidents, and the Chairman of the Board) to ensure that sufficient resources are available such as manpower, funds, and time, to implement planned programs and achieve pre-set goals.

Vice Presidents should continually monitor and evaluate their programming, making changes when necessary.

Vice Presidents should prepare quarterly evaluations

and an annual evaluation of their progress, to be included as part of the programming books for their areas. These programming books will be submitted for judging. In addition, Vice Presidents must monitor their budgets to ensure that projects are in line with established funding.

Vice Presidents should continually solicit feedback from members regarding the members' needs and interests. This will not always be done in the form of a formal survey. Make a new Jaycee friend every day!

Vice Presidents are responsible for managing the work flow in their areas. As the plan is completed, project responsibilities should be divided among the Directors. Vice Presidents should stay in close contact with the Directors, assisting them with the recruitment and training of chairpeople whenever necessary.

Vice Presidents should be aware of project developments, providing guidance over the rough spots. Many times the success of a project will depend upon the ability of the Vice President to coach and motivate, know when to step in and lend a hand, or give a pep talk. They should follow up to ensure that Directors are on target without becoming overworked or uninterested.

Vice Presidents should keep the President informed of happenings in their areas. This includes the progress of projects, problems, and successes; the complete "goings on."

Vice Presidents should communicate the schedule of events and other pertinent issues at Board meetings and general membership meetings. These should be outlined on the agenda given to the President the week prior to the meeting.

## **Working with Directors**

Vice Presidents should get to know their assigned Directors by learning about:

- Their interests, hobbies, etc.
- Their goals for the year.
- Their reasons for serving.
- Their personal goals.
- Their strengths/weaknesses.

Vice Presidents should train their assigned Directors concerning:

- The VP's goals and aspirations for the year.
- What their jobs are and how to do them.
- Where to find the resources they need in order to develop their weaknesses into strengths.
- The corporate development of goals, priorities, and assignments.

Vice Presidents should maintain constant communication with the team by:

- Holding team meetings.
- Touching base by phone weekly.
- Writing down goals, expectations, and responsibilities — each team member should be given a copy of others' goals and job descriptions.

Vice Presidents should hold their team members accountable for mutually agreed upon responsibilities by:

- Avoiding the urge to do their jobs for them.
- Always expecting the best.
- Empowering them to do the job.

Vice Presidents should maintain and reinforce the lines of communication in the chapter with:

- External organizations/individuals.
- The Chapter President.
- Other Vice Presidents.
- Directors.
- Chairpersons/general members.

Vice Presidents should foster communication up and down the ladder by:

- Working to never circumvent the line.
- Informing the President of breaches of communication protocol.

Vice Presidents should mentor the team to build future leaders by:

- Keeping a positive attitude and looking for good in others.
- Involving the team in what is being done.
- Praising strong efforts and jobs well done and saying, "Thank You!"
- Thinking of each team member as the next VP, President, etc.
- Providing constructive criticism when it can be well received.

## **Vice President Timeline**

### **GETTING STARTED**

Vice Presidents will find that the first two months are busy times for all Board members. They should remember that time spent NOW guarantees rewards in future months as the Vice President and the other members of the team begin to produce results, and goals of the programming area are realized.

Following is a list of things to be done in the first two months that will help Vice Presidents and their teams prepare for a successful year:

Review last year's chapter plan and the evaluations for the area. If the chapter submits programming books, it is likely that each Vice President will start the

year without those books. So, the prior year's VP should provide the following to their successor:

- A copy of the previous year's chapter plan
- A copy of each of four quarterly evaluations
- A copy of the annual evaluation
- A copy of the final year-end financial report (budget and actual) — these may be obtained from the Treasurer or President
- A copy of CPGs for the first- and second-quarter projects

Copies of these items should be distributed to the Directors, especially the plan and annual evaluation. These should be sent out in advance of the first team meeting. (Do not distribute the CPG copies at this time — addressed below.)

Don't wait to conduct a team meeting. The Vice President would be well-advised to schedule a team meeting as early as possible, so that everyone has a clear understanding of the area's purpose. The Vice President must determine early in his or her year where the Directors' interests lie, how each Director wants to contribute, and the goals each Director would like to see accomplished.

The Vice President should make an effort to learn why they became Directors. This is **IMPORTANT!** The Vice President won't accomplish much if the Directors aren't **INVOLVED** and **EMPOWERED**.

Complete the assigned area's chapter plan for the year as a team. Schedule and conduct team chapter planning meetings, which should include:

- Directors, the Vice President, and the President. Meetings should be structured to meet the needs of each individual team.
- Identification of the needs of the chapter as defined by the community and member survey, as they pertain to the assigned programming area, the strengths and weaknesses of the chapter, and goals the team wishes to accomplish. The Vice President should go over the budget and the calendar of events with the team.
- Time after the set of meetings is completed to type the plan in the appropriate format.
- Assignment of a portfolio of projects for each Director at the final chapter plan team meeting to ensure that the workload is both accommodating and balanced. Especially note that:

1. If a Director has a known time frame on his or her real job with excessive overtime, that Director should not be given a project to manage that falls within that time frame.

2. **NO** Director should have more than two projects going in any given month. (Ongoing projects may be an exception depending on the Director.) The CPG copies should be distributed to the appropriate Directors at this time.

- Determination by the President of the deadline for completion of the **DRAFT** of that area's chapter plan. Directors should be fully aware of this deadline. When the draft is due, the draft calendar and budget are also due.

- Determination by the President of the deadline for the **FINAL** submission of that area's chapter plan. The Board of Directors should approve the entire chapter plan (including calendar and budget) as an item of business at a regularly scheduled Board meeting. Each person on the Board should receive a copy of the entire plan.

**REMEMBER:** Directors should be fully involved in goal setting. This is an important tool in the establishment of responsibility and ownership.

Include the President in chapter planning meetings. The President's overall responsibility is to manage the chapter plan and the integration of each Area of Opportunity all year long.

The President should be informed of progress. If help is needed, **ASK!**

## **MONTHLY**

Many hours have been spent planning and strategizing. Now is the time to implement all those plans. Here are a few items that need to be done on a monthly basis to keep members informed of events and, most importantly, to help the programming team stay focused and on target.

The week before the monthly membership meeting, the Vice Presidents should:

- Contact all assigned Directors and talk with them about the projects they're managing for the current and next month.
- Offer assistance if the Director is having difficulty lining up chairpeople.
- Determine whether assigned chairpeople will be at the meeting. If so, have they talked about how to "sell" the project to the membership? If not, the Director should be prepared to promote the project.
- Ask about the date, time, and location of the project. Vice Presidents may have to help their Directors find chairpeople for projects especially in the first and second quarters.
- Organize the project information into an agenda. Each project should be listed with chairperson(s), phone number, the date, time, and location. List projects in categories:
  - Current events (any project occurring between this meeting and the next)
  - Upcoming events (any project occurring after the next meeting)
  - Ongoing events (any project that occurs on a



monthly basis)

- FYI (events that may be of interest to the membership, but aren't chapter projects)
- Turn agenda items in to the President one or two days prior to the meeting.

For the membership meeting, the Vice Presidents should: Contact all team members prior to the start of the meeting, and ensure that they understand that they, or their chairperson, will be asked to speak about their projects.

Post a sign-up sheet in the room for every project on the agenda.

The week before each Board meeting, the Vice Presidents should:

- Contact the Directors again to follow up on projects. The Vice President should ask about changes to upcoming projects, issues to be dealt with, and any budget changes that need to be approved.

- Ask the Directors to contact their chairpeople and help them write articles to promote upcoming events or report the results of events that have occurred in the prior month. (Writing project articles for the chapter newsletter is the job of the chairpersons, but they frequently need to be reminded to do so.)

- Ask whether Directors have helped their chairpeople finish CPGs for completed events or start CPGs for upcoming events.

- Prepare the Board meeting agenda. This is basically the same as the membership meeting agenda, except that projects are "moved" up. In other words, current events are now those projects occurring between this Board meeting and the next. The Board meeting agenda includes "discussion items."

- "Discussion items" are those items that need to be discussed with the Board of Directors regarding the management of the assigned area. For example, increases in the budget or the approval of a project which wasn't in the original chapter plan need to be brought before the Board. Typically, the "discussion items" are what the Board meetings are about. The rest of the agenda is intended to clarify project information and no time is spent discussing the projects listed under current and upcoming events.

Base the agenda on the Calendar of Events. The Board meeting is where Vice Presidents should be "getting ahead of the game" and implementing the plan for the future.

Write the newsletter article (the timing depends on the newsletter deadline). Each VP and the President should write newsletter articles each month. The content of the article should include the happenings in the assigned area. Additionally, chairpeople should be submitting articles about their projects.

Optional but Recommended:

- Conduct monthly team meetings with the Directors, which will help them stay organized. It also helps for the whole team to brainstorm about problems. This creates a camaraderie and an enthusiasm that the membership can't help but catch. It also gives the Vice President an opportunity to constantly evaluate the workload and redistribute it if necessary.

- Instruct the Directors to collect completed CPGs from their chairpeople prior to the Board meeting following the running of their project. This will decrease the pressure on Directors and chairpeople at the end of each quarter when it is time for quarterly evaluations.

## **QUARTER END MONTHS**

These are special months. Vice Presidents should spend time writing the chapter plan quarterly evaluation and putting together the books for submission (if the chapter does books). The first quarter will take a little longer than subsequent quarters since the evaluation will have to be formatted for the first time. **EVEN IF THE CHAPTER DOES NOT SUBMIT BOOKS, A QUARTERLY EVALUATION SHOULD STILL BE WRITTEN!** The quarterly evaluation will indicate whether the area's goals are on target.

Before actually writing the evaluation, Vice Presidents should read through all the project CPGs and go over the sign-up sheets for the projects. By doing this, project impact can be determined and, ultimately, the impact of that area of the chapter. Once impact has been determined, look at the original goals to see if the team is on track to meet those goals.

Once the quarterly evaluation is completed, Vice Presidents should meet with the Directors to discuss how they feel the quarter went. Should goals be revised? What projects should be added or deleted? Does the budget need to be adjusted? Remember, part of the reason for writing quarterly evaluations is to redirect efforts by identifying problem areas and planning solutions. The entire Board should also meet to discuss the entire chapter plan and approve revisions as necessary.

## **YEAR-END**

These are critically important months. Part of the success of the year can be measured by the way the transition period has been set up for the next team. Writing a 15-month chapter plan is an opportunity to deliver an easy transition in the first quarter.

Vice Presidents should:

- Make sure the assigned area has project run dates for the first quarter. This will allow the next team to concentrate on building a good plan while learning the

skills required to complete a successful year.

- Recruit chairpeople for first-quarter projects. Schedule first committee meetings, if applicable.
- Provide the new VP with copies of the first- and second-quarter CPGs, so they have an information base from which to run projects.
- Provide the new VP with copies of the area's chapter plan, quarterly evaluations, and an annual evaluation.
- Meet with the new VP to turn over information, share ideas, and help him or her get started on the right foot!

## Community VP

Suggested Area of Opportunity Responsibilities: Community Service, Community Fundraising, Governmental Involvement, State and National Junior Chamber Involvement, Membership Recruitment (recruitment, extensions, internal chapter assistance).

- Develop and conduct a community survey to determine the needs or problems in the community.
- Develop a plan of action for the Area based on the results of the survey.
- Assist the Treasurer in the development and maintenance of the community portion of the chapter budget.
- Supervise and train assigned Directors.
- Oversee the selection and training of project chairpersons by Directors.
- Write and submit monthly articles for chapter publication.
- Periodically evaluate assigned area plan and report progress to the chapter's Board of Directors.
- Provide a written evaluation of the area at year-end.
- Serve as or oversee a liaison between the chapter and the community. (i.e.: city government, Chamber of Commerce, other civic organizations, school board, etc.)
- Utilize community projects for the recruitment of new members into the chapter.

The Community Vice President is the leader in "community advancement." He or she directs efforts to identify community needs; selects (with the Board) the ones the chapter can effect; and determines the best way to achieve results. First, survey the community to determine those items needing to be addressed. After discussing these with the chapter Board, complete the Community Area of Opportunity portion of the chapter plan, working hand-in-hand with the Treasurer to ensure budgetary items are covered.

The Community Vice President works with the Individual Development Vice President to include community development projects in the chapter's member activation program. He or she also works with the

Individual Development Vice President to ensure members are prepared for the community development projects they have selected. The Community Vice President directs recruitment (internal and external) activities of the chapter. Get to know members and their needs, and constantly promote the chapter and member's image in the community.

## Individual Development VP

Suggested Area of Opportunity Responsibilities: Life Improvement, Chapter Management (officer and member training and communications), Member Services (orientation and activation).

- Develop and conduct a member survey to determine the strengths and weaknesses of the chapter and the needs of the members.
- Develop a plan of action for the Area based on the results of the survey.
- Assist the Treasurer in the development and maintenance of the individual development portion of the chapter budget.
- Supervise and train assigned Directors.
- Oversee the selection and training of project chairpersons by Directors.
- Write and submit monthly articles for chapter publication.
- Periodically evaluate Area plan and report progress to the chapter's Board of Directors.
- Provide a written evaluation of assigned Area at year-end.
- Oversee the selection of guest speakers to meet members' personal development needs.
- Utilize individual development projects to recruit new members into the chapter.
- Promote participation in the individual competition programs.

The IDVP is the leader in "member advancement." It is through the efforts of the Individual Development Vice President that the requests and needs of the members are addressed. First, survey the membership to determine its needs. After discussing these with the chapter Board, complete the Individual Area of Opportunity portion of the chapter plan, working hand-in-hand with the Treasurer to ensure budgetary items are covered.

Work with the Community Vice President to make sure members are prepared to conduct community-focused projects. Get to know members and their needs, and constantly promote the chapter and member's image in the community. The Individual Development Vice President should ensure that members are trained in

such a manner to conduct effective programming in all areas. The IDVP also collaborates with the Business, International, Management, and Community Vice Presidents to include their projects and programs in the promotion of member activation.

## Management VP

Suggested Area of Opportunity Responsibilities: Chapter Management (planning and evaluation), Financial Management, Chapter Activities, and Public Relations.

- Develop and conduct a member survey to determine the strengths and weaknesses of the chapter and the needs of the members.
- Develop a plan of action for the Area based on the results of the survey.
- Assist the Treasurer with the development and maintenance of the chapter budget.
- Supervise and train assigned Directors.
- Oversee the selection and training of project chairpeople by Directors.
- Oversee the publication of a monthly chapter publication.
- Write and submit monthly articles for chapter publication.
- Oversee the chapter's public relations efforts.
- Periodically evaluate the Area plan and report progress to the chapter's board.
- Provide a written evaluation of Area at year-end.
- Oversee all ways and means projects.
- Oversee recognition program for the chapter.
- Ensure Blue Chip submissions are done on a timely basis.

The Management Development Vice President keeps up with what's going on and who's doing it. Why? Because each member must be involved in the Junior Chamber to get any benefit from it. Management Development is the area that tracks the "health" of the chapter by knowing about progress being made on the accomplishments of chapter goals.

Whole chapter health is recorded through the Blue Chip program. It is the MDVP who makes sure proper paperwork is submitted for these programs. The Management Vice President provides social and recognition programs to the members to ensure continued interest in the chapter by the members.

## Business VP

Suggested Area of Opportunity Responsibilities: Business Opportunities, Leadership Development.

- Develop and conduct a member/community survey to determine the strengths and weaknesses of the

chapter/community and the needs of the members/community.

- Develop a plan of action for the Area based on the results of the survey.
- Assist the Treasurer in the development and maintenance of the Business portion of the chapter budget.
- Supervise and train assigned Directors.
- Write and submit monthly articles for chapter publication.
- Periodically evaluate Area plan and report progress to the chapter's Board of Directors.
- Provide a written evaluation of assigned Area at year-end.
- Utilize Business Area of Opportunity projects to recruit new members into the chapter.
- Promote participation in the interview competitions (Armbruster, Brownfield) and Debate competition programs. The Business Area of Opportunity Vice President responds to the needs of the membership and the community for business-oriented programs. First survey the membership and community to determine their needs. After discussing these with the chapter Board, complete the Business portion of the chapter plan, working hand-in-hand with the Treasurer to ensure budgetary items are covered.

The Business Area of Opportunity Vice President works with the Individual Area of Opportunity Vice President to include Business programs in the chapter's member activation program. Also work with the Community Area of Opportunity Vice President to make sure that members are prepared to conduct business programming for the community. The Business Area of Opportunity Vice President also ensures there is enough manpower available to run Business programming.

## International VP

Suggested Area of Opportunity Responsibilities: International Involvement.

- Develop and conduct a member survey to determine the strengths and weaknesses of the chapter and the needs of the members.
- Develop a plan of action for the Area based on the results of the survey.
- Assist the Treasurer in the development and maintenance of the International portion of the chapter budget
- Supervise and train assigned Directors.
- Write and submit monthly articles for chapter publication.
- Periodically evaluate Area plan and report progress to

the chapter's Board of Directors.

- Provide a written evaluation of assigned Area at year-end.
- Utilize International Area of Opportunity projects to recruit new members into the chapter.

The International Area of Opportunity Vice President is the leader in global awareness in the chapter. It is through the efforts of this Vice President and his or her team, that programs exposing members to different countries and cultures are developed for the chapter. And provide educational opportunities for the members.

First survey the membership to determine their needs. After discussing these with the chapter Board, complete the International portion of the chapter plan, working hand-in-hand with the Treasurer to ensure budgetary items are covered.

The International Area of Opportunity Vice President works with the Individual Area of Opportunity Vice President to include International programs in the chapter's member activation program. The Community Area of Opportunity Vice President also ensures there is enough manpower available to run International programming.

## State Director Responsibilities

The State Director is the link between the chapter and the state, national, and international organizations. Along with the Chapter President, he or she serves on the state organization's Board of Directors and Regional and District Boards, representing the views of the chapter and its members. Serving in the capacity of liaison between the state and local organizations, the State Director accurately communicates information about the state meetings and issues of importance to the members of the chapter. He or she also serves as a voice for the chapter's opinions on district, regional, and state levels.

The State Director works with the members, evaluating attitudes and trends. He or she knows when members are happy and when they aren't. These findings are reported to the Board, with suggestions for addressing these needs. The State Director also leads by example, working on projects, assisting new members, and recruiting prospective members.

The State Director also plans visitations to other chapters. Visitations can be beneficial to both the chapter visiting and the chapter being visited. Together with

the Board of Directors, the State Director selects chapters to visit, contacts those chapters, and arranges for transportation. Through work on various levels, the State Director knows what's going on around the state and therefore can identify chapters for visitations.

Through this network, the State Director is also aware of communities that don't have chapters. It is through his or her efforts that the chapter completes extensions. This involves not only recruiting, but staying in close touch with the new chapter to ensure it knows everything it must do to become successful.

The State Director will:

- Serve as a member of the state Board of Directors along with Chapter President.
- Prepare and present reports to the Board of Directors and the general membership on district, regional, state, national, and international meetings.
- Submit articles to chapter publication on activities of district, region, state, national, and international meetings.
- Develop and coordinate the chapter visitation program.
- Promote attendance at district, region, state, national, and international activities.
- Plan and coordinate the efforts of the chapter on extending new Jaycee chapters.
- Supervise book submissions to state, national, and international organizations.

## Treasurer Responsibilities

The Treasurer ensures that all financial records are kept for the chapter. These financial records include:

- Dues billings
- Tax information
- Bank records
- Correspondence with legal counsel

The Treasurer is responsible for filing appropriate paperwork in a timely manner, according to federal, state, and local laws and ensures the fiscal stability of the chapter by reviewing the bank statement and monies paid out monthly.

The Treasurer communicates regularly with the Chapter President, and also reports to the Board and membership on the financial status. In this capacity, the Treasurer works with the Vice Presidents to ensure that they are provided with the information they need for



various projects and programs. When funding is unavailable, the Treasurer recommends alternative ideas such as in-kind donations.

Working with the President and Membership Vice President, the Treasurer oversees the dues billing process for the chapter. As a Board member, he or she provides information to fellow Board members regarding membership attitude and involvement.

The Treasurer also guides and directs plans for the future of the local organization by advising the Board of financial implications of such plans. he or she leads by example, working on various projects, getting to know current members, and recruiting new members.

The Treasurer will:

- Reconcile monthly bank statements.
- Provide a financial statement for each Board meeting.
- Coordinate the chapter dues billing system.
- Pay all chapter bills within a reasonable time frame (30 days).
- Deposit all income regularly and keep detailed records of deposits.
- Prepare an annual budget; coordinate with each chapter officer responsible for any income or expense.
- Supervise the activities of the chapter finance committee.
- Coordinate an annual audit of the corporation.
- Provide for necessary insurance information for the chapter and see that payments are made on time.
- File all necessary forms and pay related fees in conjunction with maintaining corporate status.
- File state and federal tax forms and pay related fees.

## Secretary Responsibilities

The Secretary takes care of all written documents of chapter activities, keeping them in an accurate manner, including meeting minutes, agendas, newsletters, and correspondence.

The Secretary works with all Board members in an effort to provide important chapter information to members, especially via the newsletter. Because of this unique position, the Secretary is able to keep his or her finger on the pulse of the chapter.

Working with the Treasurer, the Secretary also main-

tains accurate chapter records, including the membership rosters. The Secretary leads by example, by communicating with members, working on selected projects, and by being involved in the recruiting process.

The Secretary will:

- Keep accurate records of the proceedings of all chapter meetings.
- Prepare minutes for approval at each scheduled chapter meeting.
- Count and record votes at chapter Board and membership meetings.
- Assist the President in preparing the agenda for all chapter meetings.
- Provide current membership rosters upon request.
- Maintain calendar of events.
- Handle all outgoing chapter correspondence.
- Coordinate publication of chapter newsletter.

## Legal Counsel Responsibilities

The Legal Counsel must ensure that all legal documents necessary for the chapter are completed and filed by appropriate deadlines, according to federal, state, and local laws. These include:

- Reports to the IRS
- Chapter Employer ID number
- Reports required by the state Attorney General, etc.
- Complying with USJC trademark guidelines

The State Legal Counsel will also guide and direct plans for the future of the local organization by giving advice on the legal aspects of such plans.

As with other Board members, the Legal Counsel should know the chapter's plan and goals. He or she should provide information to the other Board members on activities of the members and their attitudes and provide input to the Board on the direction the chapter is taking.

The Legal Counsel should work with other Board members to ensure that the chapter is providing the opportunities necessary for the members to get the most they can from their work in the chapter. He or she should lead by example, working on projects, working with current members, and recruiting new members.

The Legal Counsel will:

- Review all CPGs for potential liability.

- Review all contracts for the chapter prior to the President signing them.
- Prepare all reports for the state, the IRS, etc.
- Review chapter's insurance needs annually.

### **Employer Identification Number**

When a chapter asks to open a checking account, the bank will require an Employer Identification Number (EIN) from the IRS. The chapter will need an EIN when requesting inclusion in The U.S. Junior Chamber Group Exemption number and when filing federal or state tax forms.

An organization needs an EIN even if it does not have employees. An Application for Employer Identification Number (SS-4 Form) can be obtained from the Internal Revenue Service. You can complete and print the form free of charge, by visiting the IRS web site at: [http://www.irs.ustreas.gov/prod/forms\\_pub/formpub.html](http://www.irs.ustreas.gov/prod/forms_pub/formpub.html) The SS-4 Form includes instructions for obtaining the EIN by phone from the regional IRS office.

### **Chapter Incorporation**

Incorporation provides personal protection. If a project should be attended by the public and someone is injured, insurance may provide some protection, but an exclusion in the policy could deny coverage. A similar situation could arise when a group of Jaycees travel together in a vehicle that is involved in an accident, causing injury to others.

If the chapter is incorporated, the liability will most likely stop at the limit of corporate assets. But if it is not incorporated, every member could be held liable for the entire amount of liability.

Forming a corporation for a Junior Chamber chapter is simple, and the exclusion of personal liability is only one of the benefits. Find out if the chapter is incorporated as soon as possible. A record of incorporation is in the secretary of state's office in the state capital.

If the chapter's official name is "Jaycees," it should be amended to include "Also known as Junior Chamber." The chapter has license to use both names in the incorporation papers. See the chapter's attorney to draft articles of incorporation.

### **Internal Revenue Responsibilities**

There is an important distinction between a non-profit and tax-exempt corporation. Generally, any

income received by an individual or organization, whether incorporated or not, is taxable under the Internal Revenue Code. An exemption from this law is available to certain qualifying organizations.

Many Junior Chamber chapters, because of their status as organizations whose primary interest is social welfare, have been eligible for exemption from income tax under Section 501(c)(4) of the Internal Revenue Code. This exempt status is not granted automatically.

The U.S. Junior Chamber does have a group exemption. When requesting to be added to the list, use the Group Exemption Form in the forms section of the web site. Include the chapter's legal name and Federal Employer's I.D. number, along with street and mailing addresses to The U.S. Junior Chamber, Attn: Director of Finance.

If chapter officers are uncertain about the chapter's tax reporting position or responsibility, they should take no action on their own. They should check with the chapter's Legal Counsel or certified public accountant (CPA) for an explanation of the status and the steps to take to qualify with state and federal taxing authority.

### **Tax Reports**

There should be no confusion about the responsibility of a Junior Chamber chapter to file tax reports. Even if the chapter is exempt from paying income tax, it is required to file IRS Form 990.

Failure to comply with city, state, or federal tax laws could result in legal action or monetary penalty. Additionally, if the chapter has unrelated business income such as royalties or advertising income, and if the annual gross receipts are more than \$25,000, it may be necessary to file an IRS Form 990T.

Because of the many factors involved, specific recommendations or instructions cannot be offered here. If there are any questions about the tax status of the chapter, an attorney or CPA should be contacted.

## **Public Relations Director Responsibilities**

The Public Relations (PR) Director in the chapter is frequently an overlooked position. Having a PR Director can benefit a chapter in many ways including influencing others to join the chapter, informing the

community about the chapter's activities, increasing attendance at chapter events, and so on.

The PR Director position is a valuable addition to a chapter and as such, the individual assigned to this area should have no other responsibilities.

Specifically, the PR Director is responsible for the following:

- Assist the Management Development Vice President in writing the PR portion of the chapter plan.
- Work closely with each Vice President to promote all chapter projects.
- Promote chapter activities internally through the chapter newsletter and at chapter meetings.
- Promote chapter activities externally through press releases to all media outlets, including television, radio, and print.
- Work with state and national Junior Chamber organization to promote Junior Chamber programs.
- In absence of Chapter President, act as spokesperson for the chapter.
- Actively seek out potential new members and work to add them to the chapter roster.
- Lead by example by being visible in chapter activities.

For additional information on running the chapter's PR program, refer to the PR Guide in the Library Section of the web site.

## Chaplain Responsibilities

The Chaplain coordinates the activities of a chapter with regards to spiritual development programming.

We know that it is impossible for our organization to program Jaycees into spiritual growth. As Emerson states, "God enters by a private door into every individual." The Jaycees' spiritual development concept is that rather than programming spiritual development, we are concentrating on a people-to-people exchange of attitudes and ideals. This exchange through involvement in Jaycee activities has and will continue to stimulate members to be aware of the importance of spiritual involvement in their lives.

Regardless of the leadership and guidance exerted by The United States Junior Chamber and the USJC Chaplain, a spiritual development program cannot be

effective if local officers and other members within a chapter do not receive a local Chaplain's guidance and assistance.

A local Chaplain will:

- Coordinate the efforts of others in spiritual development and help members put action into their belief "That faith in God gives meaning and purpose to human life."
- Conduct nondenominational religious activities within the chapter that educate and develop the members spiritually.
- Serve as member of the chapter's Board of Directors and regularly report spiritual development activities to the Board.
- Submit articles of a spiritual or motivational nature to the chapter newsletter on a regular basis.
- Work with chapter members to determine the needs and desires of the membership for spiritual development programming.

Much like Individual Development programs and projects, the imagination and desire of the individual members of the chapter will guide the creation of spiritual development programs and projects. The key to successful spiritual development programming is to keep these programs nondenominational in nature. Remember, Jaycee membership comes from many different religions and faiths.

The following are some ideas for spiritual development programming:

Share Your Faith — have individual members visit different community churches, temples, or synagogues to experience different faiths and religions.

Invocations/Benedictions — deliver nondenominational invocations and prayers at all chapter membership and Board meetings.

Spotlight the Clergy — hold a community gathering such as an ice cream social to honor the clergy in the community. Could be held in conjunction with the chapter's Distinguished Service Award program with recognition available for Most Outstanding Religious Leader in the community.

Prayer Breakfast — a simple breakfast with a short nondenominational program. The program can consist of special speakers from different religions and/or Junior Jaycees or other groups providing singing or dancing.

Newsletter Chaplain's Corner — provide inspirational nondenominational quotes, prayers, and/or stories in each chapter newsletter. Newsletter article should also mention illnesses, deaths, births, birthdays, etc., of Jaycee members and their families.

For additional information and project ideas, contact the Junior Chamber Products Department for "A Chaplain's Guide to Conducting Spiritual Development Projects." You can visit them at [www.juniorchamber.org](http://www.juniorchamber.org).

## Local Director Responsibilities

The Local Director provides the necessary communication link to the assigned members. Local Directors call their assigned members at least twice a month, keeping them informed of chapter activities and receiving valuable feedback.

Local Directors should make "How's it going?" calls from time to time to learn what the members are feeling about issues of importance to the chapter and communicate these to their assigned Vice Presidents and fellow Board members.

Local Directors also recruit project chairpersons, working with them to make sure they know how to carry out their responsibilities. In this case, Local Directors work with other chapter officers to ensure chairperson's needs are addressed.

Local Directors will:

- Assist assigned Vice President in developing assigned Area of Opportunity plans.
- Communicate regularly with Vice President.
- Recruit and train project chairpersons in CPG process.
- Communicate regularly with project chairpersons.
- Report progress of assigned projects at Board of Directors meeting.

### How to Recruit Chairpeople

A. Before a chairperson is selected.

1. Chairperson's Profile.

a. Develop project hierarchy to determine number of people. How many committee members will need to be supervised?

b. Loosely determine goals. What is to be accomplished with this project?

c. Determine amount of time chairperson should be a member of the chapter to run the project. Can a new member reasonably run the project?

d. Determine project experience necessary to successfully run project. Is a first-time chairperson okay, or is prior chairperson experience necessary?

e. From this "profile," select target group of members that could run project. Review chapter roster to target members that fit the criteria.

f. Recruit most appropriate chairperson.

Once the target profile of a chairperson is defined, the chapter roster should be reviewed for potential candidates who meet the chairperson's profile. Then SELL, SELL, SELL! If it is determined that the target chairperson already has the skills necessary to run the project and those skills can be presented to them, they can easily be sold on chairing the project!

B. After a chairperson is selected.

1. What to do before the CPG is submitted.

a. Meet with chairperson to do CPG training. Thoroughly explain the CPG process.

b. Require a rough draft from chairperson at least one week before CPG is due to VP.

c. Review rough draft with VP.

d. Return rough draft to chairperson with necessary revisions. Meet with the chairperson to go over any necessary changes to the plan.

e. Submit final copy to VP for submission to Board of Directors.

f. Advise chairperson of necessary changes before Board of Directors meeting.

g. Meet with chairperson to go over potential objections to project and train him or her on how to present CPG to Board of Directors.

2. What to do after the CPG is submitted.

a. Follow Director and VP calendars to make sure projects are following the outlined steps.

b. Attend day of event.

c. Communicate with chairperson as necessary.

d. Aid the chairperson as necessary, but do not accept the responsibility.

3. Submitting final CPG.

a. Meet with chairperson to train them in the final CPG process.



- b. Require a rough draft from chairperson at least one week before CPG is due to VP.
- c. Review rough draft with VP.
- d. Return rough draft to chairperson with necessary revisions.
- e. Submit final copy to VP for submission to Board of Directors.
- f. Advise chairperson of necessary changes before Board of Directors meeting.
- g. Meet with chairperson to train him or her on how to present CPG to Board of Directors.

### **Dos and Don'ts of Training Chairpeople**

#### **DO:**

- Choose chairpeople carefully and well in advance (use chairperson's profile).
- Use membership resources to secure chairpeople.
- Train chairpeople thoroughly and in person (use CPG process).
- Encourage chairpeople to attend chairperson's training sessions.
- Require a rough draft of CPGs and review in advance of submission to VP and Board of Directors.
- Attend chairperson's project.
- Give plenty of notice for quarterly updates and train chairpeople on how to do them.
- Train chairpeople to present at Board meetings.
- Train chairpeople to delegate to their committee.
- Train chairpeople on how to write final CPG.
- Write thank-you notes on regular basis.

#### **DON'T:**

- Throw an old CPG at a chairperson and expect them to write a CPG on their own.
- Recruit chairpeople at general membership meetings or M-nights.
- Let chairpeople "hang" at Board meetings by not informing them of potential conflicts with their projects.
- Inform chairpeople of important dates at the last minute.
- Twist arms to get members to chair projects. (Sell them on benefits!)
- Fly by the seat of your pants — you won't be successful!



# THE BOOK: Chapter Management

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- **Profile of a Healthy Chapter**
  - **Basic Needs of People in Groups**
  - **Blue Chip**
  - **Chapter Plan**
  - **Surveys**
  - **Board Member Training**
  - **Suggested Agenda for Board Training**
  - **Build a Winning Team**
  - **Goal Setting**
  - **Communication**
  - **Delegation**
  - **Effective Meetings**
  - **Board Meetings**
  - **Parliamentary Procedures**
  - **New Member Orientation**
  - **Mid-Year Review**
- 

## 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.



# THE BOOK: Membership

- **The Member Management System**
- **The Mechanics of Membership and Growth**
- **To Grow**
- **A Guide to Successful M-Nights**
- **Extension Blueprint**
- **In-Chapter Extensions**
- **The Prospecting Game**
- **Identifying and Attracting Prospective Members**
- **A Guide to Referral List Recruiting**
- **Recruiting Ideas, Contests, and Incentives**
- **Anniversary Dues**
- **ACS**
- **Sample Letters**

## The Member Management System

Once the “chapter plan” has been completed, it’s time for theories and plans to be put to the test, and there’s only one way to make the plan work: people. This is where the member management system comes into play in a chapter’s success.

A **member management system** is any project that turns good people-management concepts into activities which produce members who are active and motivated continuously to reach individual and chapter objectives.

**Springboard** is a formal member-activation program for new members and Degrees of Jaycees is available for long-term members. The Leadership Academy is a project for long-term members to guide new members.

**Springboard** and **Degrees of Jaycees** can be combined for use with the Leadership Academy. Each of these is a path for members to follow to learn about the Junior Chamber and experience personal growth in a logical manner. Forms for the Springboard and Degrees programs have been included in the forms section.

**SPRINGBOARD**, designed for first-year members, is a tool for the chapter to activate new members, ensure that they have every opportunity to gain the benefits of membership, and are able to make a fully informed decision when it comes time to renew their membership.

**ENROLLMENT:** The new member should complete the Springboard enrollment form, ask the Chapter President to sign it, and mail it to the state office. This will enroll the new member in the Springboard program.

**CERTIFICATION:** Upon completion of the Springboard requirements, including renewing dues, the new member should complete the Springboard Certification Form, ask the Chapter President to sign it,

and mail it to the state office. This will certify the new member in the Springboard program. Once new members have completed the Springboard requirements, they will have earned their first three Degrees.

**DEGREES OF JAYCEES** continues where Springboard leaves off. Degrees of Jaycees is a career path for members, providing a logical sequence of events to be followed. By working through the various requirements spread across 10 degree levels, members will learn and grow in the Junior Chamber experience.

For the member, Degrees is a guide for personal growth. In addition, each member completing the Degrees of Jaycees program achieves the benefits of leadership training while directly affecting the experience of other members.

For the chapter, Degrees of Jaycees is a personnel management program which can be used toward the achievement of chapter goals through member participation. The chapter also gains increased visibility and influence within the community. The Degrees program is divided into three phases, as described below:

**Phase 1: INVOLVEMENT** — The first three degrees provide newer Jaycees with opportunities to experience orientation, training, community awareness, and sharing Jaycees. (see Springboard)

**Phase 2: EXPERIENCE** — Degrees four, five, and six are designed to let Jaycees use their experiences from the first phase to develop skills in activation, action, and recruiting.

**Phase 3: LEADERSHIP** — The last four degrees use the participants’ training and leadership skills gained in the first two phases.

**CERTIFICATION:** When a degree has been achieved, members should complete a Degrees of Jaycees Certification Form, listing the degree and the activities completed. Chapter Presidents must sign the forms and send them to their state office.

*Note: Participants must complete one degree at a*

time. There are no retroactive items. Only degrees completed during the current Junior Chamber year are accepted.

**LEADERSHIP ACADEMY** is a mentoring program developed after discovering that, on average, less than half of all new members renew their membership commitment after the first year. By teaming an experienced member with a new member, new members can be guided through the first year, helping them become actively involved in the chapter and increasing the member's motivation to renew.

New-member activation may be the most important work of the chapter administration team. Without new members and subsequent renewals, there can be no experienced members and no chapter to render needed service to the people in the community.

The Springboard program is a good guideline for the Academy member to use with the new member, as it provides basic information for the new member. A chapter is not required to run the Springboard program in order to run the Leadership Academy program or vice versa. However, it is strongly encouraged to run the programs together. They were developed to be used together and work best that way.

There are no structured training programs or forms to be filled out for the Academy program. Any experienced member who is interested in the growth and well-being of the chapter is eligible to be an Academy member.

This activation program should be used in a way that will best benefit the chapter and its members. Since the requirements are optional, the program can be adapted to fit the specific needs and goals of individual chapters. However, chapter leaders should ensure that the program remains challenging and rewarding.

For more information about the **Springboard** or **Degrees of Jaycees** programs, a Degrees of Jaycees manual is available through The Junior Chamber Products Department, 800.331.3248.

## The Mechanics of Membership and Growth

The mechanics of chapter growth are the easy part! Calls are made to members to see if they'll renew, and new members are recruited using a five-step process in the recruiting section. All Board members should review the membership roster and dues payments. They should know who will and will not renew and the reasons for those decisions.

Real chapter growth, however, is a step or two beyond the mechanics. It involves asking and answering the following questions:

- What is the progress of the chapter plan?
- Are members participating?
- Are members complaining?
- Do members seem satisfied with projects and project assignments?
- Are Board members serving the members?
- Are Board members promoting the ultimate goals of the chapter?

Real chapter growth has two components: 1) number of new members, and 2) scheduled activities and real results. The following questions should be asked and answered:

- What is the chapter's image in the community?
- Does the community turn to the Junior Chamber for help?
- Does being a Jaycee stand the member in good stead in the eyes of the community?

Real chapter growth also involves the lasting effects involvement has had on past members. The following questions should be asked and answered:

- Did being a member of the chapter give past members the skills they needed to get a better job?
- Did their involvement make them better citizens?
- Did their involvement give them the courage to stand and be counted?
- Did their involvement give them more confidence in taking and completing tasks?
- Does the community recognize their accomplishments?

*Note:* True chapter growth is not a year-long goal. It is a lifetime goal for the chapter. A member's improved standing in the community should be indicative of personal growth. After all, the Junior Chamber is all about learning and improving ourselves and our communities. The only way we truly achieve this improvement is by practice. The results are worth it. The best gift a chapter can give a community is a better, more involved citizenry.

## To Grow

The steps to growth include the following:

- Determination of the chapter's membership needs
- Development of a plan that follows chapter objectives
- Scheduling of activities to meet the plan
- Following through with scheduled activities

The first growth step involves the determination of the number of members the chapter will need to fulfill objectives. Officers should look at the chapter's



calendar of events and determine whether enough manpower is available to accomplish scheduled activities. This should be reviewed along with a roster listing the names of members and renewal dates. The membership plan (which is part of the overall chapter plan), should also be reviewed.

The objective is best illustrated by this example: the chapter will run several projects requiring a lot of manpower; however, several current members will soon reach age 40 and exhaust their membership. **Schedule membership activities now**, along with the planned chapter projects, to ensure the chapter doesn't suffer from these losses.

The following are useful membership activities:

## RECRUITING

Recruiting follows the basic rules of salesmanship, which include:

- Listen to those you are trying to recruit
- Be honest
- Be yourself
- Know the product
- Keep a positive attitude

Techniques vary, but the rule of thumb should be to choose a comfortable technique. The more comfortable a person is with his or her presentation, the easier recruiting will be.

The following steps are used by most successful recruiters (and salesmen!):

- Introduce yourself and your chapter.
- Find out information about the prospect that will help you match the interests of the Junior Chamber to those of your prospect.
- Talk about the Junior Chamber, using information learned in step two.
- Get the prospect to agree with you about how the Junior Chamber is important to the community and the individual.
- Ask the prospect to join, fill out the application, and ask for dues money. Ask for referrals, too.

If the prospect is reluctant, offer to pick him or her up for a chapter meeting or event. It is easier to recruit if prospects can see the immediate results of the chapter's efforts. An excellent training tool for new members is to send them recruiting with a long-term member, allowing them to learn first hand.

## THE REFERRAL SYSTEM

The referral system simply refers to the use of lists of prospective members provided to the recruiter by others. Anyone can provide a referral, including those who decline the invitation to join. However, referrals won't work unless follow-up work is done!

Sources of referrals include:

- **Current members.** This includes individuals they work with, attend church with, family, friends, neighbors, etc.
- **New members.**
- **Business leaders.** This includes the names of employees, managers, or business owners who might benefit by joining the chapter.
- **Welcome Wagon.** This can provide access to new residents in the community.
- **Membership booth.** This can be located in an area with heavy pedestrian traffic.
- **Voter registration lists.** These can be obtained from the county courthouse and used for a mass mailing.
- Assign several Jaycees to promote the chapter to the public during every **Community Area of Opportunity project.**
- **The mayor, city servants, and ministers.**

The chapter can:

- Ask for referrals when recruiting.
- Conduct a community survey.
- Sponsor a sweepstakes for a popular toddler's toy at a local business. Ask for parents' names, addresses, and phone numbers on the entry forms so that follow up with a personal visit or phone call can be scheduled. Allow only adults to complete the forms. Also, include an age bracket question (under 21? 21 to 39? 40 and over?), and ask if they would be interested in hearing more about the Junior Chamber. Follow these up with personal visits or phone calls.

## CONTESTS AND INCENTIVES

Recruiting can be promoted through contests and incentives for members. These need not be complex or expensive. The most important step when developing an incentive program is to identify the types of incentives that will interest the members.

Free incentives might include:

- A personal letter from the mayor or governor
- Recognition in the chapter, district, region, or state newsletter
- Special parking at meetings
- Name mentioned in a letter to the editor of the local newspaper
- Free lawn care for a month
- Free home paint job

Incentives the chapter might pay for include:

- Gifts, plaques, pins
- Tickets to a sporting or arts event
- Registration to a state Board meeting

# A Guide to Successful Membership Nights

The primary purpose of an M-night is to sign new members. The ultimate goal of Jaycees is to develop leadership skills. You can accomplish both with a well planned and organized M-night project.

Membership nights are meetings or events designed specifically to encourage people to join your chapter. They can be abbreviated meetings with a speaker, or simply special events to allow prospects and new members to meet in a relaxed setting. They also provide an opportunity for long-time members to become acquainted with new members. Remember, however, this is a side benefit. The primary purpose of an M-night is to sign new members.

## To ensure a successful M-Night:

- Plan it like a project. Identify members who wish to serve on the M-night project committee. Have that group complete a Chairman's Planning Guide and appoint a chairperson.

- Decide what type of meeting you will conduct; a social or one with a motivational speaker.

- Establish the date, time, and place. Ask and confirm a guest speaker.

- Promote your M-night a minimum of 30 days in advance. Do a publicity blitz. Your members must hear it three times and see it in print twice before they will retain it. Report on it at meetings, promote it with fliers, television, radio, newspaper, bulletin boards, postcards, and newsletters.

- Get personal commitments from members to invite prospective members. Ask for the names of their guests.

- Encourage your members to bring their prospective members. Do not expect prospects to come if they are not picked up. Prospects have a fear of the unknown. They do not know exactly what will happen and usually don't know any of the people that will be there. Members must pick them up.

## Ways to make the meeting FUN:

- Use the sample membership meeting agenda as a guide.
- Have a greeting committee. Personally welcome every attendee. Smile!
- Give everyone a name badge. Use one color pen for members and a different color for prospects.
- No clumping! Ask all members to talk to every prospect. Prospects are easy to identify if every-

one has the special colored badges.

- Never allow a prospect to stand alone.
- Tell your members who were not sworn in before that they will have the opportunity to do so at this meeting. Ask them to come forward when asked after the meeting is convened. This will encourage the prospective members who want to join to come forward too.
- After being sworn in, give the new members something. A pin, a booklet on Jaycees, a newsletter, or a membership roster are some items that may be used.

## Other creative ideas are:

- Get a limousine donated from a local limousine rental company. Use it to pick up the prospects.
- Use a theme such as July 4th or Mardi Gras.
- Attractively printed and personalized invitations are effective.
- Call the meeting "Bring-A-Friend" night and ask your members to do that.
- Distribute a flier promoting the date and location of the orientation for those who join at the M-night.
- Don't charge a prospect for anything at the meeting.

## Things to do after the meeting is adjourned:

- Ensure the prospective members complete and return their membership applications.
- Ask for their dues payment. If they joined, they know they must pay. Just ask.
- If some who joined didn't bring their check-books, give them a self-addressed, stamped envelope to mail their dues check in.
- Continue to encourage prospects who didn't get sworn in to join. Sometimes they're afraid to go up front.

## Some follow-up suggestions for people who didn't attend the meeting or didn't join:

- Put the names of all these people on a Prospective Member Follow-Up Form and add them to your chapter's newsletter list.
- If they didn't come, mail them a postcard explaining that you missed them.
- If they did come, thank them for taking time to attend.
- Call and invite these people to another meeting or project.
- Smile, be friendly, and keep asking!

### Some follow-up suggestions for people who joined:

- The President writes a letter or postcard welcoming them as members including the date, time, and place of the next meeting and event.
- Call them before the next event and invite them to attend. Pick them up!

### Sample M-night Agenda

Time to allow for each activity:

- **30 minutes prior to arrival of guests.**

Committee members arrive early to set up the room. Greeters arrive and set up welcoming table.

- **30 minutes prior to the program.**

Guests begin to arrive and are welcomed. Guests and members mingle. Refreshments may be served.

- **Program: 30 minutes maximum.**

Stop serving refreshments during the meeting. Call to order, invocation, pledge to the flag, welcome, introduction of guests, explanation of purpose and a brief outline of chapter activities.

- **Allow 10 minutes additional if you have a speaker.** Speaker's presentation.

- **After the speaker, take a 15-minute recess to personally encourage prospects to join.**

Ask current members to mingle, answer questions, and explain what will happen during the swearing-in ceremony.

- **Allow 10 minutes to swear in those who have decided to join.**

Ask all people (not just people joining tonight) who haven't been sworn in to come forward.

- **Allow plenty of time for people to mingle and one-on-one recruiting with those who have not joined.**

## In-Chapter Extensions

In addition to extending new chapters in new communities, existing chapters may "go the extra mile" and increase the size of their chapter. This process is called an "in-chapter extension." In a given month, if a chapter adds a certain number of new members to the chapter, this is called an in-chapter extension. Any chapter may complete an in-chapter extension in any month. A chapter may be in an isolated area, for example, and may not have a community nearby that could benefit from a Jaycee chapter. In this case, if the chapter still wants to participate in the extension process, an in-chapter extension is appropriate. The same activities as an external extension should happen, and the same type of support for the new members is necessary. The number of new members

required is based on a chapter's population division (based on size of the community). Please refer to the chart below.

<u>Chapter Pop.</u> <u>Division</u>	<u>New Members Needed</u>
1	7 members
2	10 members
3	12 members
4	15 members
5	18 members
6	20 members
7	22 members
8	25 members
9	7 members

## Anniversary Dues

The Anniversary Dues system is an important chapter management tool, designed to encourage member recruitment and dues collection each month of the year. It can help a chapter keep up with its members, in person and on paper, giving them individual attention and the chapter a steady flow of members.

The Anniversary Dues system is one in which the chapter receives, each quarter, a list of all members whose membership anniversaries fall during that quarter. A member's anniversary month is defined as the month the member is placed on the membership rolls at The U.S. Junior Chamber National Service Center.

The Chapter President, Treasurer, and Membership Vice President should set up an efficient system for handling members' dues at the beginning of the year. A good system can prevent last-minute scuffles to get members to renew their membership.

The member's due date is in the column under PAID on the chapter roster printout. This can be used to set up the collection procedure. The following suggested collection procedure should not be used to replace the member activation procedure and IS NOT to replace member activation:

- Members should be billed by the first of the month prior to when their membership is due; i.e., if a member is due to renew September 30, they should be billed by August 1.

- A letter from the President encouraging the member to continue his or her activity in the chapter should be included with the billing.

- If the dues are not paid promptly, a follow-up phone call should be made in 30 days. Either the Treasurer or the member's assigned Director should make the call.

- If the dues are unpaid two weeks before the deadline, the President should call the member.
- Members should be acknowledged upon receipt of their dues.

## REPORTS AND FORMS FOR MEMBERSHIP ACCOUNTING

**There are six basic forms in the Anniversary Dues membership accounting process.** The use of each is explained below. Reviewing this section should prevent errors and explain how the process can become a management tool for the chapter.

*NOTE: All membership activity and dues should be sent to the state office. The state office will then submit the information to The U.S. Junior Chamber at the end of the billing month.*

### Form 1 — Chapter Roster

**The chapter roster is a complete listing of every member in the chapter and includes certain vital information on each of those members.** The chapter roster is mailed first class to each chapter.

The state name and number and the chapter name and number are recorded in the upper left-hand corner. Beneath that is the chapter name and permanent chapter address (PCHA). All mail will be sent to this permanent chapter address, therefore, it is important to ensure that this address be correct.

The date through which the roster is accurate is located at the top in the center of the page. Keeping these rosters in a notebook, in chronological order, ensures easy access to records.

Also listed at the top, to the right of center, are the chapter's charter date, population division, Region Director, and District Director. If this information is incorrect, contact the state office to correct it.

Each member who has been submitted to the U.S. Junior Chamber is listed alphabetically (by last name) with that member's Junior Chamber Identification Number, gender (M-male or F-female), member type (R-regular), last name, first name, address, birth date, paid-through date, monthly activity, anniversary date, and Degrees of Jaycees/Springboard information. If any of this information is incorrect, excluding the Junior Chamber Identification Number, which is assigned by the National Service Center, and paid-through date, which cannot be changed, it is necessary to submit changes in writing to the state office.

A misspelled name must be corrected by contacting the state office. To correct a birthdate or change a last name, a copy of the member's driver's license is needed. The member's address is the address printed on all mailing tapes for state, national, and JCI publications and should be kept up-to-date at all times.

If the U.S. Junior Chamber receives notification from the post office that an address is incorrect, and no correction is available, that member is given a "code 4." This means that the member's name will not be printed on any mailing tape issued by the U.S. Junior Chamber. If a member is a "code 4," an asterisk will appear beside his or her member "type" designation.

When the U.S. Junior Chamber receives a new member, the month that his or her name is entered into the computer becomes the anniversary date. The member's name will be printed on a chapter billing sheet for that particular month each year until he or she is dropped. The paid-through date is the month and year for which a member has paid his or her membership dues.

### Form 2 — Chapter Summary

**The chapter summary, which prints at the end of each chapter roster, gives the monthly and year-to-date figures on the membership activity. It keeps track of all transactions for members.**

The summary should coincide at all times with the information listed on the roster. If it does not, contact the state office immediately.

### Form 3 — Transfer

**A Transfer Form must be completed and submitted with a \$5 transfer fee to the state office for any paid member wishing to transfer membership to another chapter.**

The forms are available through the state office or a chapter may utilize the last columns on the Add/Change Form by showing where the member is transferring from, including the state and the chapter number. Place a "T" in the change column.

When processing has been completed, the transfer will be reported to the chapter in the Activity column on the chapter roster and will show the member's anniversary date.

### Form 4 — Membership Add & Change

**A three-part Add/Change Form will be sent to each chapter each month as part of the Dues Bill.**

The state's name and number and the chapter's name and number needs to be printed in the upper left-hand corner of the form. This form can be used to submit new members, report address changes, and complete transfers. The first two pages of the Add/Change Form are to be mailed to the state office. The third copy is to be retained for chapter records. ***ALL NEW MEMBERS ARE REQUIRED TO SUBMIT BIRTH DATE INFORMATION. ANY NEW MEMBER SUBMITTED WITHOUT BIRTHDATE***



*INFORMATION WILL NOT BE PROCESSED.*

### Form 5 — Dues Bills

A three-part Dues Bill will be sent to each chapter for each month in which members have anniversary dates. The bill lists all members up for renewal during that month. This bill will be received about 90 days in advance of the first month of the date members are due.

As soon as the bill is received, it should be reviewed. Every member must be contacted. When a member renews, an “R” should be placed in the renew box at the far left of the bill.

Members not indicated as renewed will automatically be dropped from the roster when the bill is processed. However, **any mark in the renew column will serve as a request for a member to be renewed** (members can only be renewed in their billing month). If a person is not to be renewed, leave this space **blank**. To ensure the accuracy of the organization’s data, do not put new member adds or changes on the Renewal Form.

**The first two pages of the Dues Bill are to be mailed to the state office. The third copy should be retained for chapter records.** If the Dues Bill for a month is lost, contact the state office; they have a copy of the bill.

### Form 6 — Dues Computation

The U.S. Junior Chamber supplies a Dues Computation Form to each chapter. This worksheet combines the state, U.S. Junior Chamber, and JCI dues rate, and is used to calculate the amount due.

The chapter name and month of submission on both halves of the form should be filled out first. Then the appropriate number of members should be included in the proper space. When this is completed, the calculations can be made.

Checks should be made payable to the state organization for the amount shown at the bottom of the form. The State Copy of the form should be sent to the state office, along with copies of the Dues Bill and/or Membership Add/Change Forms. The chapter copy should be retained for chapter records.

## Active Chapter Size Chart (ACS)

<u>Chapter Pop.</u>	<u>Community Population</u>	<u>ACS</u>
1	0-850	30 members
2	851 - 2,500	35 members
3	2,500 - 5,000	40 members
4	5,001 - 15,000	50 members
5	15,001 - 30,000	60 members
6	30,001 - 75,000	75 members
7	75,001 - 150,000	90 members
8	150,001 - and Up	125 members
9	non-reg. chapters	30 members

### For More Membership Information Contact

USJC Membership  
Services Department:  
PO Box 7  
Tulsa, OK 74107-0007  
918.584.2481  
fax 918.584.4422  
[directormembership@usjaycees.org](mailto:directormembership@usjaycees.org)

**[www.usjaycees.org](http://www.usjaycees.org)**



# THE PROSPECTING GAME

*The purpose of the Prospecting Game is to help chapter members identify potential members using a game format in order to make recognizing new people both easy and fun.*

## Prospecting Game Instructions:

- Play the game at a chapter meeting. Advertise in the chapter newsletter when the game will be played and why and how it will be played.
- Purchase (or get donated) prizes for members of the winning teams.
- Divide the members in attendance at the meeting into teams of three to five people making sure both new and old chapter members are on each team.
- Bring at least one area phone book for each team (members can be asked in advance to bring their own phone book).
- Make at least one copy of the Category Sheet and several copies of the Prospect Sheet for each team.
- Explain how winning teams will be determined before the game begins. A suggestion is to offer one point for each name and one point each for the address, city, ZIP, and phone number for the person identified as a prospect. The team with the most points wins.
- Ask the teams to look at the Category Sheet and identify people they know who could be prospective members who fit into the categories.
- Ask teams to clearly print information about their prospects on the Prospect Sheet.
- Have a time limit (15 minutes at minimum).

## Other Ways to Play the Prospecting Game:

- Allow the teams to take the game home, complete it, and return it at the next chapter meeting.
- Play the game once every quarter. Keep the team members throughout the year and award prizes for the teams with the most points for the year.
- Allow prospects from categories other than the ones listed on the Category Sheet to be used.
- Award prizes to the second- and third-place teams.
- Award a super grand prize to the team that identifies a person in each of the 144 categories listed on the Category Sheet.
- Instead of dividing the attendees at a meeting into teams, ask members of the Board of Directors to pick four other people to be on their teams.
- Allow the teams to make up creative team names such as The Prospecting Kings, Super Recruiters, etc.
- Allow members to play individually.
- Make completing a Prospect Sheet a Springboard or Degrees of Jaycees requirement.
- Give teams five or 10 extra points if they recruit a potential member from their Prospect Sheet.



# THE PROSPECTING GAME

- By playing this game, potential members for the chapter can be identified while having fun!
- This sheet lists 144 categories of people and occupations. Identify a person who fits one of the categories. On the Prospecting Form, write the category from which the prospect was chosen, their names, their street addresses, cities, ZIP codes, and phone numbers.
- Good luck prospecting!

- |   |   |   |  |
|---|---|---|--|
| <input type="checkbox"/> Attorney               | <input type="checkbox"/> Insurance Agent            | <input type="checkbox"/> Emergency Medical Technician (EMT) | <input type="checkbox"/> Co-Worker               |
| <input type="checkbox"/> Doctor                 | <input type="checkbox"/> Dentist                    | <input type="checkbox"/> Accountant                         | <input type="checkbox"/> Roller Blader           |
| <input type="checkbox"/> Florist                | <input type="checkbox"/> Hair Dresser               | <input type="checkbox"/> Optometrist                        | <input type="checkbox"/> Clothing Salesperson    |
| <input type="checkbox"/> Office Manager         | <input type="checkbox"/> Neighbor                   | <input type="checkbox"/> Bank Manager                       | <input type="checkbox"/> Plumber                 |
| <input type="checkbox"/> Jeweler                | <input type="checkbox"/> Car Dealer                 | <input type="checkbox"/> Family Member                      | <input type="checkbox"/> Aerobic Instructor      |
| <input type="checkbox"/> Mechanic               | <input type="checkbox"/> Veterinarian               | <input type="checkbox"/> Waitress                           | <input type="checkbox"/> Teacher/Educator        |
| <input type="checkbox"/> Druggist               | <input type="checkbox"/> Furniture Salesperson      | <input type="checkbox"/> Politician                         | <input type="checkbox"/> Sports Team Member      |
| <input type="checkbox"/> Contractor             | <input type="checkbox"/> Engineer                   | <input type="checkbox"/> Repairperson                       | <input type="checkbox"/> Little League Parent    |
| <input type="checkbox"/> Appliance Dealer       | <input type="checkbox"/> Musician                   | <input type="checkbox"/> Tire Salesperson                   | <input type="checkbox"/> Chiropractor            |
| <input type="checkbox"/> Bowler                 | <input type="checkbox"/> Account Executive          | <input type="checkbox"/> Radio Personality                  | <input type="checkbox"/> Antique Collector       |
| <input type="checkbox"/> Volleyball Player      | <input type="checkbox"/> Tennis Player              | <input type="checkbox"/> Waiter                             | <input type="checkbox"/> Gardener                |
| <input type="checkbox"/> Bus Driver             | <input type="checkbox"/> Stock Broker               | <input type="checkbox"/> Softball Player                    | <input type="checkbox"/> Hospital Worker         |
| <input type="checkbox"/> Clergy                 | <input type="checkbox"/> Dry Cleaner                | <input type="checkbox"/> Caterer                            | <input type="checkbox"/> Postal Worker           |
| <input type="checkbox"/> Basketball Player      | <input type="checkbox"/> Fisher                     | <input type="checkbox"/> Nurse                              | <input type="checkbox"/> Country Music Lover     |
| <input type="checkbox"/> Graphic Designer       | <input type="checkbox"/> Golfer                     | <input type="checkbox"/> Funeral Director                   | <input type="checkbox"/> Administrative Asst.    |
| <input type="checkbox"/> Pet Owner              | <input type="checkbox"/> Librarian                  | <input type="checkbox"/> Pilot                              | <input type="checkbox"/> Marriage Counselor      |
| <input type="checkbox"/> Motorcycle Owner       | <input type="checkbox"/> Baker                      | <input type="checkbox"/> TV Personality                     | <input type="checkbox"/> Union Member            |
| <input type="checkbox"/> Photographer           | <input type="checkbox"/> Physical Therapist         | <input type="checkbox"/> Weight Lifter                      | <input type="checkbox"/> NASCAR Fan              |
| <input type="checkbox"/> Graphic Artist         | <input type="checkbox"/> Landscaper                 | <input type="checkbox"/> Fire Fighter                       | <input type="checkbox"/> Security Guard          |
| <input type="checkbox"/> Flight Attendant       | <input type="checkbox"/> Artist                     | <input type="checkbox"/> Computer Operator                  | <input type="checkbox"/> Camping Enthusiast      |
| <input type="checkbox"/> Utility Employee       | <input type="checkbox"/> Jogger                     | <input type="checkbox"/> Truck Driver                       | <input type="checkbox"/> Construction Worker     |
| <input type="checkbox"/> Dental Hygienist       | <input type="checkbox"/> Hostess                    | <input type="checkbox"/> Farmer                             | <input type="checkbox"/> Union Member            |
| <input type="checkbox"/> Police Officer         | <input type="checkbox"/> Brick Layer                | <input type="checkbox"/> Line Dancer                        | <input type="checkbox"/> Boat Owner              |
| <input type="checkbox"/> Social Worker          | <input type="checkbox"/> Bartender                  | <input type="checkbox"/> Parole Officer                     | <input type="checkbox"/> Seamstress              |
| <input type="checkbox"/> Tailor                 | <input type="checkbox"/> Baseball Player            | <input type="checkbox"/> Satellite Dish Owner               | <input type="checkbox"/> Chain Store Employee    |
| <input type="checkbox"/> Band Booster           | <input type="checkbox"/> Republican                 | <input type="checkbox"/> Works in a Mall                    | <input type="checkbox"/> Hunter                  |
| <input type="checkbox"/> Painter                | <input type="checkbox"/> Psychologist               | <input type="checkbox"/> Sculptor                           | <input type="checkbox"/> Detective               |
| <input type="checkbox"/> Girl Scout Leader      | <input type="checkbox"/> Usher                      | <input type="checkbox"/> Democrat                           | <input type="checkbox"/> Secretary               |
| <input type="checkbox"/> Chef                   | <input type="checkbox"/> Cub Scout Leader           | <input type="checkbox"/> Road Worker                        | <input type="checkbox"/> Hotel Employee          |
| <input type="checkbox"/> Paralegal              | <input type="checkbox"/> Receptionist               | <input type="checkbox"/> Life Guard                         | <input type="checkbox"/> Newspaper Reporter      |
| <input type="checkbox"/> Drafter                | <input type="checkbox"/> Relative                   | <input type="checkbox"/> Wears Glasses                      | <input type="checkbox"/> Water Skier             |
| <input type="checkbox"/> Has a Beard            | <input type="checkbox"/> Soccer Parent              | <input type="checkbox"/> Church Choir Member                | <input type="checkbox"/> Swimming Pool Owner     |
| <input type="checkbox"/> Environmentalist       | <input type="checkbox"/> Phone Salesperson          | <input type="checkbox"/> Investment Counselor               | <input type="checkbox"/> Sports Coach or Manager |
| <input type="checkbox"/> Carpenter              | <input type="checkbox"/> Carpet Salesperson         | <input type="checkbox"/> Real Estate Agent                  |  |
| <input type="checkbox"/> Government Employee    | <input type="checkbox"/> Convenience Store Employee | <input type="checkbox"/> Restaurant Employee                |  |
| <input type="checkbox"/> Grocery Store Employee |   |   |  |



THE UNITED STATES JUNIOR CHAMBER®

# THE PROSPECTING GAME

CATEGORY	
NAME	
STREET ADDRESS, CITY, ZIP	MAY WE USE YOUR NAME WHEN CONTACTING THIS PROSPECT? <input type="checkbox"/> YES <input type="checkbox"/> NO
PHONE	

CATEGORY	
NAME	
STREET ADDRESS, CITY, ZIP	MAY WE USE YOUR NAME WHEN CONTACTING THIS PROSPECT? <input type="checkbox"/> YES <input type="checkbox"/> NO
PHONE	

CATEGORY	
NAME	
STREET ADDRESS, CITY, ZIP	MAY WE USE YOUR NAME WHEN CONTACTING THIS PROSPECT? <input type="checkbox"/> YES <input type="checkbox"/> NO
PHONE	

CATEGORY	
NAME	
STREET ADDRESS, CITY, ZIP	MAY WE USE YOUR NAME WHEN CONTACTING THIS PROSPECT? <input type="checkbox"/> YES <input type="checkbox"/> NO
PHONE	

CATEGORY	
NAME	
STREET ADDRESS, CITY, ZIP	MAY WE USE YOUR NAME WHEN CONTACTING THIS PROSPECT? <input type="checkbox"/> YES <input type="checkbox"/> NO
PHONE	

CATEGORY	
NAME	
STREET ADDRESS, CITY, ZIP	MAY WE USE YOUR NAME WHEN CONTACTING THIS PROSPECT? <input type="checkbox"/> YES <input type="checkbox"/> NO
PHONE	

CATEGORY	
NAME	
STREET ADDRESS, CITY, ZIP	MAY WE USE YOUR NAME WHEN CONTACTING THIS PROSPECT? <input type="checkbox"/> YES <input type="checkbox"/> NO
PHONE	

CATEGORY	
NAME	
STREET ADDRESS, CITY, ZIP	MAY WE USE YOUR NAME WHEN CONTACTING THIS PROSPECT? <input type="checkbox"/> YES <input type="checkbox"/> NO
PHONE	

CATEGORY	
NAME	
STREET ADDRESS, CITY, ZIP	MAY WE USE YOUR NAME WHEN CONTACTING THIS PROSPECT? <input type="checkbox"/> YES <input type="checkbox"/> NO
PHONE	

CATEGORY	
NAME	
STREET ADDRESS, CITY, ZIP	MAY WE USE YOUR NAME WHEN CONTACTING THIS PROSPECT? <input type="checkbox"/> YES <input type="checkbox"/> NO
PHONE	





THE UNITED STATES JUNIOR CHAMBER®  
**PROSPECTIVE MEMBER  
FOLLOW-UP FORM**

---

Prospective Member's Name	Contact Dates				Date 1st Meeting	Date 1st Project	Date Signed
	1st	2nd	3rd	4th			
Street Address							
Phone Number							

Prospective Member's Name	Contact Dates				Date 1st Meeting	Date 1st Project	Date Signed
	1st	2nd	3rd	4th			
Street Address							
Phone Number							

Prospective Member's Name	Contact Dates				Date 1st Meeting	Date 1st Project	Date Signed
	1st	2nd	3rd	4th			
Street Address							
Phone Number							

Prospective Member's Name	Contact Dates				Date 1st Meeting	Date 1st Project	Date Signed
	1st	2nd	3rd	4th			
Street Address							
Phone Number							

Prospective Member's Name	Contact Dates				Date 1st Meeting	Date 1st Project	Date Signed
	1st	2nd	3rd	4th			
Street Address							
Phone Number							

Prospective Member's Name	Contact Dates				Date 1st Meeting	Date 1st Project	Date Signed
	1st	2nd	3rd	4th			
Street Address							
Phone Number							

Prospective Member's Name	Contact Dates				Date 1st Meeting	Date 1st Project	Date Signed
	1st	2nd	3rd	4th			
Street Address							
Phone Number							



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## **Identifying and Attracting PROSPECTIVE MEMBERS**

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1. Ask a sports celebrity, Mayor, a local legislator, or a panel of politicians to speak at a chapter meeting. Use lots of publicity. Invite prospective members to attend.
2. Provide prospects with something free such as a chili dinner, casino night, beer, films, steak fry, dance, barbecue, family picnic, or a chance to win a raffle. Give a larger prize such as a weekend at a resort to the 30th prospect to walk in the door.
3. Host a sporting event between prospective members and Jaycee members. (Example: softball, volleyball, basketball, trap shooting, hunting events, card games, indoor or outdoor putting contest, etc.)
4. Rent a van or bus and pick up all prospective members on a meeting night. Put a Jaycee sign on the vehicle and advertise the “pick up” in the local paper and on the radio.
5. Provide a service for the prospects such as mowing lawns, raking leaves, painting rooms, washing cars, etc.
6. Have police “arrest” prospects and then ask the prospects to join the Jaycees. Have Jaycees, wearing chapter shirts, do the recruiting.
7. Establish a telephone recruiting campaign. Five Jaycees call the same prospect within an hour on the same night asking the prospect to join. The last caller asks if anyone has offered an invitation to join lately.
8. Get pictures of prospects and make a “Most Wanted” poster to put on display in a prominent place in town.
9. “Kidnap” the family of a prospect and treat the family to a meal or movie while treating the prospect to a beer or soft drink and recruiting them into the chapter.
10. Purchase (or get donated) a Big Wheel tricycle. Display the Big Wheel at a popular business location and give away free raffle tickets to win it. Ask parents to write their names, addresses, phone numbers, and ages on the tickets. At a later date, invite the Jaycee-aged participants to an M-night or chapter social.
11. Greet people as they enter a chapter project such as a Haunted House. As they exit, give them something compliments of the chapter. Talk with them about chapter activities and ask if they would like to participate and join.
12. Personally distribute membership applications to prospects at local sporting events or other community activities with a special invitation to a chapter meeting.
13. Present each newcomer in the city with a packet of Jaycee materials. Include a meeting schedule and personal invitation to attend a chapter event. Offer to help the new family get settled and oriented to the community.
14. Print a large newspaper advertisement stating “Special Sale on Jaycees! This Week Only!” Make the ad like any sales ad but list the major activities of the chapter and date, time, and location of chapter meetings and invite prospective members to attend.



## A Guide to

# REFERRAL LIST RECRUITING

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### Step 1: Make the Referral List.

- Gather names of people aged 21 - 39 (ask current chapter members, business leaders, and community leaders for names of prospective members).
- Bring a few phone books to a chapter meeting. Divide the attendees into teams and reward the team that identifies the addresses and phone numbers of the most people from the list with prizes.
- Utilize the Prospecting Game in this section of *The Book*.

### Step 2: Use the Referral List.

- Ask the Mayor for a letter of recommendation and endorsement for Jaycees (see sample letter in this section of *The Book*).
- Identify a location that has multiple phone lines and arrange to use it one week on Monday, Tuesday, and Thursday evenings.
- Type the Chapter President's congratulations letter on chapter letterhead for each prospect on the list from step one and have the Chapter President personally sign each one (see sample letter in this section of *The Book*).
- One week before the calling begins, mail a packet containing a congratulations letter and mayoral letter to each prospect on the list from step one.
- Plan to run an article in the local paper about the Jaycees, the chapter, and its projects the same week of mailing.
- Have a minimum of six people committed each night of the calling week. Two people call the prospects and two teams of two people visit the prospects.

### • The Phone Call:

1. Introduce yourself.
2. Explain to the prospect, "You have been referred by \_\_\_\_\_. They thought you would be an excellent Jaycee. Are you familiar with the Jaycees?"
3. Briefly talk about the Jaycees.
4. Ask if someone may deliver a membership pamphlet that evening and explain that the visit will only take a few minutes.

### • The Visit:

1. SMILE! Introduce yourself.
2. Ask questions of the prospect such as, "Where do you work? Do you have a family? What do you do in your spare time?"
3. Talk about the Jaycees relating activities in the local chapter to the prospect based on answers received from the questions asked in the previous step.
4. Ask the prospect questions that they will have to answer "YES" to such as, "Do you think we need more activities for children? Would you like to learn to manage your time better?"
5. In closing, ask the prospect to join, complete a membership application, and pay first year's membership dues.
6. Ask for referrals such as friends or coworkers the prospect would like to see more often.
7. SMILE! Shake the prospect's hand and congratulate them on joining. Tell them where and when the next chapter meeting or project will be held and offer to pick them up.



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# RECRUITING IDEAS, CONTESTS AND INCENTIVES

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- Team competition between members such as new members vs. old members, men vs. women, etc. The winner is determined by the most members recruited within the given time period. Losers of the competition must wear unusual costumes to a chapter meeting, take a pie in the face, provide the winners with free dinner, etc.
- Send a special newsletter to all prospective Jaycees describing the benefits of membership and asking them to join.
- Adjourn during a chapter meeting asking everyone to leave and bring a prospect back to the meeting.
- Print a newspaper article with information on the Jaycees, the chapter, and chapter projects with a photo of a new member being sworn in.
- Have a membership booth at all projects. Place a sign at all projects reading, "Jaycees at Work — Inquire Within!" Organize recruiting teams for all projects and activities to talk with prospects about joining.
- Designate a prospect as the "Secret Prospect." The Jaycee who recruits that person gets a prize.
- Have a region or district M-night. Invite all the area chapters and publicize the event in local newspapers.
- Ask state officers to help with recruiting.
- Reward each chapter member with twenty-five cents at a chapter meeting if they have a membership application in their pockets, purses, or wallets.
- Make a list of the projects the chapter conducts with a brief explanation of each. Print a membership application on the back and give them to chapter members to aid in recruiting.
- Issue a marble to each chapter member (the larger the better) and ask them to carry it at all times to remind them to sign up new members. If they cannot produce the marble on request, fine them twenty-five cents at the next chapter meeting.
- Prepare a dart board with one-, five-, and ten-dollar bills taped to it. If a chapter member brings a guest to a meeting, they get to throw one dart at the board. If they recruit a new member, they get two throws. Whatever the dart hits on the board, they can keep.
- Establish criteria for being a superstar by using Springboard and Degrees of Jaycees programs as guides. Give extra credit to those involved in the programs for recruiting new members.
- Use a strange costume or toilet seat at chapter meetings. A member must wear the costume until they recruit a new member, and then they pass it on to their choice of other member.
- Issue a hospital ID bracelet to each member. Ask them to wear it until they recruit a new member. Issue bracelets at least three times during the year. Save the old bracelets in a bowl for display at chapter meetings.
- Exchange "can't gets." Ask members to write the names and phone numbers of people they have talked to about joining the Jaycees but haven't yet recruited. Exchange the names with other chapter members.
- Divide members into competition teams. Points are awarded for applications and money; one point for each application and five points for each application with money. The team with the most points gets a prize.
- Bring a bottle of wine or other prize to a chapter meeting. Pass around a sheet of paper. The last member (or the eleventh member, the third female, etc.) who writes the name, address, and phone number of a prospective member on the sheet wins the prize.





# The Book : Training

- **Characteristics of a Good Trainer**
- **How Adults Learn**
- **ID Facilitator's Guide**
- **The Personal Improvement Philosophy**
- **Taking the First Step**
- **Roles**
- **Promoting the Event**
- **Resources**
- **Logistics**
- **Tools for Conducting Your Event**
- **Facilitating the Program**
- **Effective Discussions**
- **Role Playing**
- **Mini Speeches**
- **Brainstorming**
- **Case Studies**
- **Suggested Room Layout**
- **Role Playing**
- **PRIME**

## Characteristics of a Good Trainer

There will be opportunities to train nearly everyone in the chapter at one time or another: Board members, project chairpeople, committee members, chapter members involved in projects, those attending seminars on various self-improvement topics; someone in the chapter will be training constantly. Don't forget that one-on-one training is a constant in the Junior Chamber. Even though some may not consider it "training," anytime someone seeks counsel, responding is actually training.

As the chapter plan is developed, the President and the other members of the Board must identify the skills members will need to complete projects and programs. "What will it take for this to happen?" should be a constant question. Beyond this, ask, "What will it take to gain stature in the community?" Improved citizenry has long been a goal of the Junior Chamber and should be a major motivator in planning and promoting the chapter's training program.

**Characteristics of a Good Trainer:** Everyone has probably done training at some point without realizing it. Perhaps it was a talk to a roomful of people explaining how to fix something. Maybe a report was given to the chapter on the results of the softball team. Any group presentation gives the speaker experience in training people. The following are attributes of a good trainer:

• **Speaking ability:** Being able to **talk in front of a group** is one of the most valuable characteristics a trainer can have. If the trainer has had little or no experience

doing so, he or she can gain it while learning to be a trainer. Stand up and say something at the next meeting. Such experiences will develop a person's ability to think and react while giving a presentation. A speaker doesn't have to be entertaining to present ideas logically and confidently. **Keep the message simple and speak with authority.**

• **Honesty:** Be honest throughout training. If asked to conduct a training session on an unfamiliar subject, be sure to prepare thoroughly beforehand. If unsure of the answer to a question, say so, but find out the correct answer and follow up with whomever asked the question. Suggest someone else knowledgeable in the subject, or contact the State President for other suggestions.

• **Dependability:** Build a reputation as a dependable person. When accepting an invitation to do a training session, be a trainer others can depend on as responsible and knowledgeable. **Fulfill commitments.** Don't cancel at the last minute just because something came up. Be on time. Dress for the occasion. Prepare in every way possible for the training session.

• **Thoughtfulness:** It's not necessary to start every presentation with a joke. A positive story or humorous anecdote could be more effective. A trainer should be fair and treat everyone with the respect he or she would appreciate if he or she were in the audience.

• **Enthusiasm:** One characteristic separates the good trainers from the great — enthusiasm! A word with Greek roots, enthusiasm means "from God within." The last four letters in the word, **i-a-s-m**, offer another meaning: **I Am Sold, Myself.** A trainer should show the audience he or she believes in their own training.

• **Flexibility:** A good trainer must be able to

digress from the planned format and adapt to current conditions while still covering the subject. Sometimes the audience will interrupt with discussion questions. Answer those questions but make the important points of the presentation as well. Also be prepared for last-minute requests to include additional information in the session. Being flexible means **being knowledgeable enough to handle the unexpected and humble enough to change the standard.**

- **Creativity:** A creative trainer uses what is already known and applies it to the training session. Such a trainer piques the group's interest and encourages independent thinking. Keep an open mind in training and listen for new ideas. **Try to get the points across in new ways.** Combine current knowledge with new ideas and techniques. It will make the session much more interesting and improve the trainer's skills.

## How Adults Learn

Research has shown adults learn differently than children. To better address specific adult needs, keep in mind the following points:

- Adults have less time for learning
- Pressures of day-to-day tasks limit the adult's attention span
- Adults see the trainer as a source of information.
- Adults do not see themselves as learners
- An adult's willingness to learn is not related to his or her ability to learn
- Adults often work in repetitive, static situations
- Adults become motivated to learn when the information they're provided is seen as important

To maximize adult learning, it's important to understand the principles of adult learning and motivation. These five basic guidelines will help a trainer improve the amount of information his or her adult students retain:

- Keep them active
- Use examples
- Get feedback
- Help participants understand the meaning of the new knowledge or skills
- Relate training to Junior Chamber and non-Junior Chamber experience

An understanding of how adults learn helps in becoming an effective trainer. Participatory learning is the key to adult learning. Use feedback to help participants better understand the training purposes. When **participants get information that relates to**

**their experience or background,** it increases their understanding of a subject. First begin with ideas and concepts familiar to the participant. Then move on to the new idea or concepts. Stress to them the importance of what they're learning as it relates to their lives.

## ID Facilitator's Guide

*Personal Improvement*

*Career Enhancement*

*Life Skills*

*Professional Development*

No matter how it's referred to, Individual Development (ID) is an important part of the package for local members.

This guide is a tool for developing and conducting personal and professional development programs for Junior Chamber members and non-members. It is not meant to train or create new instructors, but rather to enable chapters to **FACILITATE** an Individual Development program.

The word facilitate is a transitive verb meaning "to make easy or easier." A facilitator's job is to make implementing an ID program easier. Do not confuse this role with that of the instructor, lecturer, or trainer. The facilitator's job is to plan the event, promote the event to potential attendees, and handle all logistical requirements. This includes securing the guest presenter for the ID program. Only if the facilitator is familiar with the subject matter of the ID program should he or she instruct the course. It is better to bring in "experts" than provide inaccurate or incomplete information. As a member of the group, the facilitator may find it difficult to "teach" other members of the chapter. Credibility and familiarity are key factors in making an effective presentation. Often, a member of the group may be too familiar to the group to be seen as an objective and informative source.

To assist in facilitating ID programs, ideas are offered for chapters to use as resources for speakers, trainers, and ID materials. Logistical details such as promotion, facilities, and room set-up, as well as trainer or discussion leader ideas, will be presented.

# The Personal Improvement Philosophy

The sole purpose of the Junior Chamber movement is to meet the personal and career development needs of young people.

More than 75 years ago, Henry Giessenbier and a group of young men in St. Louis established the Junior Chamber for personal reasons. They wanted to move ahead in their careers and their lives, but they faced a classic “catch-22.” To advance they needed more experience, but the only way to get more experience was to advance. They found they faced similar problems but had differing solutions to those problems. That diversity became their strength. Coming from a variety of backgrounds, they discovered they possessed a wide range of talents, skills, and abilities, and along with the natural leaders in the group, they found and used available resources both within and out of their group.

With the help and guidance of established civic and business leaders, the St. Louis group determined its own needs and set about meeting those needs. To advance their careers, members needed skills in planning, budgeting, training, communication, and supervision. To gain those skills, they channeled their collective efforts in a unified direction. Committees were formed. Chairmen elected. Goals set. Timetables established. Resources marshalled. Management and workers trained. Manpower took action.

First, they built the organization. Membership swelled from 32 to 750 members in just five months. Lectures, speakers, and training sessions provided the group with “classroom” knowledge. But some laboratory-like vehicle was needed for members to practice what they had learned. Community service projects were the answer. Community projects allowed practical application of the lessons learned in the classroom. Members built a parkway, conducted a city-wide clean-up effort, and promoted a community pride campaign. Like a well-oiled machine, the diverse parts of the Junior Chamber movement began to work toward the common goal of building better people.

Today, the Junior Chamber is re-emphasizing its purpose: Provide the opportunity for personal development and leadership training through community service and organizational involvement. Everything in the Junior Chamber is Individual Development. Every project, every meeting, every experience expands the abilities of Jaycees. Each new situation presents opportunities and choices. Actions are the results of choosing. Personal growth is achieved through each set of cir-

cumstances. Ideas are conceived. Beliefs are strengthened. Opinions are formed. Memories are mentally filed away for future reference and use.

Chapter projects serve as a vehicle for hands-on learning. “Off-the-job” training while benefitting society is how Junior Chamber members transform classroom learning into self-improvement. All the skills to plan, promote, and manage a Junior Chamber project are directly transferable to real-life situations. Community Development projects are the laboratory where Junior Chamber members learn while doing.

Activation and retention programs like Springboard and Degrees of Jaycees are the basic tools needed for human resource development. Chapter Planning Guides, Blue Chip, and Chairman’s Planning Guides are systems and strategies to harness and channel available resources to achieve desired results. Each position or office in a chapter or state organization offers even greater opportunities for responsibility, authority, and leadership.

To supplement the multitude of personal development experiences available through involvement in the Junior Chamber organization, resource materials are available to help members expand their knowledge. Many chapters and state organizations have developed comprehensive programs to help build personal and professional skills. Junior Chamber International also offers a wide variety of programs and materials, including its Training Institute programs, PRIME, and EXCEL, to train and develop new Junior Chamber trainers and instructors. The USJC Training Task Force annually provides new training programs and opportunities to members. See the end of this chapter for a listing of training modules available from the Training Task Force.

Whatever the needs for personal improvement, the U.S. Junior Chamber has the means available to meet those needs. A multitude of resources and personal development opportunities sit quietly in the community, waiting for us to tap their riches. The topic, breadth, and scope of Individual Development programs is limited only by imagination.

Each member is an unfinished product. Each member has “rough edges” to smooth and exceptional skills to polish. Each individual must be a seeker of knowledge! Opportunity knocks but once, and often so softly that it’s unnoticed. To grow as individuals, members must proactively seek experiences and situations that stretch their limitations and expand their minds.

It has been said, “You only get out of something what you put into it.” In the Junior Chamber, it could be more accurately stated, “You only get out of your Junior Chamber experience what you take from it.” The

opportunity to grow as a person is here. But members must recognize those opportunities and use them to their advantage; to selfishly strive to improve. Building better people is what the Junior Chamber is all about!

## Taking the First Step

The appointment as an Individual Development program chairperson does not automatically make the chairperson an expert in positive mental attitude, goal setting, personal planning, time management, or communications. The real job title is that of coordinator or facilitator. The chairperson is an arranger of facilities, materials, people, and time. This is a challenging role that can help the chairperson grow as a person and as a leader. The chairperson may wish to conduct one or more of the sessions themselves because of special talents they possess. The chairperson should not be expected, nor should want, to conduct all seminars. There is a wealth of talent available to assist in seminar presentations.

Never, never forget: an Individual Development program is a participation program. It is not a lecture series. Monologue should be used only to stimulate dialogue, ideas, and experiences. The concepts verbalized by the group leader should be followed with stimulating questions.

Set goals and priorities for the project. Set a goal to be the chapter's outstanding chairperson of the year. Use the Chairman's Planning Guide format to help conduct a successful program. One popular definition of success is "preparation meeting opportunity."

To help the chairperson prepare and succeed, a sample checklist of items to consider in planning and conducting an Individual Development program follows in the Facilitating the Program section of this chapter. Items may be added or deleted to fit the individual program. Basically, this checklist is meant to stimulate thought so that the chairperson can conduct the best Individual Development program possible.

## Roles

**Chapter Individual Development Vice President (IDVP):** is responsible for planning and implementing personal development programs for chapter members. Many chapters will also have directors or committees to work with the IDVP.

The chapter IDVP will begin the year by conducting a member needs analysis, or survey. To conduct effective programs, it is vital that the specific needs of chapter members be addressed. Therefore, specific member needs must be determined.

Using the member needs analysis, the chapter IDVP and the ID committee members will complete the Individual Area of Opportunity of the chapter plan. This leads to development and implementation of a specific plan of action. A calendar of activities is developed and active promotions of ID opportunities begin. Project chairpersons are selected and each ID program is conducted to meet member needs. The chapter's IDVP and ID committee monitor and evaluate efforts, adapt to changing needs, modify programming efforts, and summarize results at year-end.

**The Committee Chairperson:** As with any activity, someone must coordinate efforts. The committee chairperson is the catalyst in implementing a distinctive part of the chapter plan. To assist the committee chairperson, chapters use a simple project management tool, the Chairman's Planning Guide (CPG). The CPG form is located in the Project Planning section of The Book.

**State Individual Development Vice President:** The state IDVP serves as a resource to chapters. He or she promotes Individual Development programming throughout the state and often conducts various ID programs for chapters. Most will communicate with chapters through newsletters to chapter IDVPs, mailings to Chapter Presidents, and articles in state publications. The state IDVP also plans and implements member education opportunities at state meetings through seminars, workshops, and Individual Development colleges. In some states, the IDVP also coordinates the individual competition programs: Armbruster, Brownfield, Family of the Year, Speak-Up, Write-Up, Debate, and Jaycee Jeopardy.

**State Organization:** In addition to the state IDVP, there are other state Junior Chamber officers who are ready, willing, and able to assist the chapter's Individual Development programming efforts. Start with the chapter's District and/or Regional Director. They should be most in tune with the chapter's plan of action and the projects to be conducted to meet the needs of the members. The DD and RD can be sources of ideas and information. They are aware of what area chapters are doing in the ID area and can offer useful suggestions.

Most other state Vice Presidents, state Officers, and state Program Managers can also provide information about their specific area, as well as ideas on what other chapters around the state are doing.

## Promoting the Event

The first question to consider: Is this ID program for members only, members and spouses, members and



guests, or will it be open to the public? The answer will determine the avenues of promotion available to the chapter.

**Promotional efforts to Junior Chamber members** — Regardless of the ID program the chapter plans to offer or its source, promotion of the program is vital! Initially, the chairperson must sell the program. The best sales jobs are usually done on a one-on-one basis. The committee cannot just announce an Individual Development seminar at a general membership meeting and expect a significant turnout. Talk to key chapter officers. Get them to work with the committee in promoting the benefits of the ID program. If the chapter Board of Directors regularly communicates with each member, be sure to have Board members publicize the ID program. Have the ID committee use “calling trees” to speak to every member of the chapter.

Sell benefits, not features. A feature of a ball point pen is that it has a clip. The benefit is that when the clip is utilized, the pen will not fall out of your pocket and will not be lost.

A feature of the Individual Development program could be that goal setting techniques are discussed. The benefit is when these techniques are used and mastered, they can direct efforts and change an individual’s life.

Promote participation in the seminar by letting people know what this program or other ID programs have done for others. Since most people are attracted to new ideas and concepts by positive reinforcement from those they respect, use stories of people who have been through the program and have applied its principles successfully in their lives and in the Junior Chamber.

Chapter publications should be used to promote the ID program, as well as provide a calendar of future ID programs. The advance notice and written reminder that the chapter publication provides allows members to schedule their participation. Short, attractive articles or space fillers work well. A promotional article may state the objectives and/or the key points the ID course will cover. For many people, a well-written promotional “tease” or attention-getter is irresistible. Often a key “selling” feature may be the reputation or background of the speaker or trainer, from whose expertise and experience participants will benefit.

Postcards and/or letters to members are also effective reminders of the upcoming ID program.

**Promotional efforts to non-members** — Programs open to spouses and guests are promoted in much the same manner as described above. The difference being that members will bring spouses or guests. Therefore, they will need promotional information that they can use to encourage a spouse or

guest to attend. Arm them with details of the benefits the ID program offers. Make it appealing to non-members, keeping in mind that many of these non-members are prospective Jaycees.

If the program is open to the public, use all the public communication vehicles available to get the word out. Newspaper ads, radio and television PSAs, posters, and circulars are a few of the alternatives available. The Public Relations Guide in *The Book* describes promotional efforts and resources.

The local business community provides an excellent promotional source. The chairperson or a committee member should contact company management to determine specifically whose approval is needed within the company. It could be the manager, the company president, the personnel supervisor, or the human resource development director. The chairperson will need to again sell the program’s benefits to the person with approval authority. Employee newsletters and bulletin boards can be used to spread the word. Ask if the company will allow promotional information to be placed and have managers encourage employee participation.

The company may want to target specific employees for attendance. They may even ask the chairperson to talk with employees face to face. The chairperson must be credible and professional in his or her approach. The business community will formulate its opinions of the chapter and the benefits of the ID programs offered based on the image they perceive.

## Resources

For materials, there are the obvious Junior Chamber sources. The chapter may have program materials left over from a previously conducted ID program. The state organization may offer information or materials, especially if it is emphasizing a specific ID program, topic, or area. Contact the state IDVP or the state chapter service center.

The U.S. Junior Chamber offers a variety of individual workbooks as well as audio and videotape programs for personal development. The Junior Chamber Products Catalog contains a listing of the ID materials available. Call 800.331.3248 for more information or to place orders. Additional free publications are available on the USJC web page at [www.usjaycees.org](http://www.usjaycees.org)

Junior Chamber International also offers a selection of member education materials and programs. For information on JCI materials, contact Junior Chamber International, PO Box 140577, Coral Gables, Florida 33114-0577, phone: 800.545.6982.

Keep in mind that adults learn best through participation. Active, open discussions are critical. Hands-on involvement promotes memory retention. Note taking and the opportunity for participants to write down their thoughts and feelings are crucial to the learning process. Interactive workbooks, such as those available through The U.S. Junior Chamber, work well in any training situation.

Many larger companies, especially those with human resource development (HRD) or training departments, have personal and professional development reference and/or resource information the chapter may use. HRD and training departments may operate a training library or learning center with materials such as books, films, video, and audio programs available for loan or rental.

The local community will contain numerous resources. For virtually any ID subject the chapter chooses to offer, instructors, speakers, and trainers are available in the vicinity. They are the “experts” that lend the air of authority to the chapter ID program. Ask friends, family, and fellow members for ideas in finding an expert.

## Logistics

What is “logistics?” It is procuring and maintaining materials and personnel relative to a specific task or assignment. Basically, it is the details that need to be handled to complete a project. Facilities, materials, needs, and communications are all part of logistics.

**FACILITIES** — The facility used must be conducive to learning. Bright, well-lit, climate-controlled areas are best. Participants must not be crowded. The type of session will dictate needs. Lectures require theater-style seating. Discussions often call for a conference-style setup. Interactive sessions can call for open floor space. Note taking or idea capturing needs a classroom environment.

If projected attendance exceeds the facility’s capacity, try to find a larger location. Or, limit participation for each program, and then conduct the same program more than once.

Many chapters have a meeting hall that may be used. But keep in mind that familiar surroundings sometimes stifle creative thinking and expression of ideas. Often a new environment affords a better learning opportunity because the participant’s senses and natural curiosity are aroused. This heightened awareness encourages learning.

There are many other locations that can provide an adequate learning environment. Elementary and secondary schools, colleges, and universities have

ample classroom areas. Libraries, hotels, restaurants, churches, shopping centers, medical facilities, and the Chamber of Commerce often have meeting areas available. Some government buildings, courthouse, and city halls offer public or private meeting space. Groups with meeting halls, (Lions, Moose, Elks, DAR, VFW, Knights of Columbus, etc.) may provide an area for large or small groups.

In seeking a facility, items such as access to electrical outlets, audio systems, restrooms, climate control, parking, accessibility for disabled persons, tables and chairs, kitchen areas, cleaning and damage deposits, location of light switches, and who will have keys to let you in and lock up behind you need to be considered. Consider the training needs as well. Does the presenter need audio-visual equipment, projectors, screens, televisions, VCRs, blackboards, or flip charts? Are podiums and lecterns available? Is smoking prohibited? Even if smoking is permitted, the guest presenter may not want smoking within the training room itself.

Once selected, make sure everyone has detailed directions to the location, especially if it is not a place regularly used by the chapter, or by the community if the program is open to the public.

Other logistical needs include agendas, refreshments, program evaluations, trainer needs, and follow up after the session.

**AGENDAS** — Every training function should have a brief agenda. At a minimum, the committee chairperson and the guest presenter need one. Be sure to schedule 10- to 15-minute breaks every 90 minutes or so. For the best learning environment, do not let any session extend beyond two hours. It is said that the mind can only absorb what the posterior can endure.

For participants, agendas may list the training objective(s) and the schedule for the session or sessions. The chairperson or committee can either pre-place agendas at each seat, or distribute them at the beginning of the session.

The agenda should include things like opening comments, training objective(s), announcements, participant introductions, guest speaker/trainer/presenter introduction, topics to be covered, scheduled breaks, evaluations, and closing. Each ID program will have its own scheduling needs, so adapt the agenda to satisfy them.

**REFRESHMENTS** — The purpose of refreshments is to help participants feel more comfortable. For some people, life without coffee, tea, or ice water is simply unbearable. Helping them feel more comfortable opens their minds to learning. If participants are requested not to smoke inside the training room, it is a good idea to provide some refreshments. Snack foods like cookies, crackers, or a vegetable tray can provide

participants with an alternative to smoking. Hard candies and mints are also effective and they help people provide more verbal responses by keeping their mouths moist.

Consider the following: length of session, proximity to last or next normal meal time, availability of and access to refreshments at the facility (vending machines, restaurants, coffee makers, water service, etc.), and time. Providing refreshments at the back of a training room or in an adjacent room greatly speeds participants' return from scheduled breaks because they do not have to leave the immediate area in search of their own refreshments. It also allows them to return to their learning environment with snacks in hand.

Once a need has been determined for refreshments, consider the requirements. Is a coffee maker, coffee, cups, sweetener, creamer, spoons or stirrers, napkins, soft drinks, or ice water needed? Will chips, dip, crackers, cheeses, meats, vegetables, or sandwiches be served? Are serving trays, plates, utensils, tablecloths, and trash containers needed? Can participants bring in their own food and drink? Is there a corkage fee? Are ice and refrigeration available? Is a server needed? Who will clean up?

Generally speaking, alcohol has no place in a training session. The exceptions would be a wine or beer sampling program, or a home bartending course. Then, only small samples should be used. No alcoholic beverage should be served in excess, and no participant should be allowed to consume in excess.

**EVALUATIONS** — Program evaluations do two things: first, they cause participants to remember what has been covered. Second, they provide feedback so the chairperson can determine if the audience learned what was intended to be taught.

Be sure to schedule the sessions to include time for the program evaluations to be distributed, completed, and returned before participants leave at the end of the course.

**TRAINER NEEDS** — To best facilitate an effective learning experience, the chairperson must determine and meet the specific requirements of the presenter(s). Do they need a blackboard, flip chart, overhead projector, VCR and TV, or slide projector? What would they like to drink during the session? Do they have any handouts that need to be reproduced? How would they like the training room set up? Do they need a podium or a lectern? Do they need a microphone, and if so, what type (hand-held, free standing, lavalier, or wireless)? Does the presenter need someone to assist during the presentation? Many of these answers will help determine the facility needs.

**FOLLOW UP** — Even after the Individual

Development program has concluded, the project is not complete. There are thank-you notes or letters to write, expenses to finalize, and summaries or reports to prepare.

Immediate, written thanks is proper etiquette and professional behavior. Thank the guest presenter(s), the person who coordinated the facility, the committee members, sponsors, donors, and others who helped in any way. A written thank you is vital, as it provides a record for the chairperson and the person being thanked. Employers often note an employee's participation or the service they provided. People are more willing to be helpful in the future if the chairperson remembered to thank them for previous efforts. Sponsors and donors are more likely to give again if thanks are received after their contribution. A guest presenter may appreciate a letter of thanks on chapter letterhead, as it provides them with a testimonial from a satisfied customer. Similarly, businesses appreciate formal letters of thanks on chapter letterhead. Often these letters pass upward through management or are posted on company bulletin boards. People love to be told they've done well!

Obviously, any outstanding bills must be paid and the budget finalized. The chairperson may be expected or required to provide a final summation of the program at a chapter Board meeting or membership meeting. The Chairman's Planning Guide must be completed to serve as a reference tool for someone else to use in preparing a similar ID program. The chairperson or the chapter may wish to submit the program for project book competition at the state or national level. (See the Awards Manual for details.)

## Tools for Conducting Your Event

The next section of this guide is designed to help the chairperson and/or the guest speaker, trainer, lecturer, or presenter in the actual instruction phases of an Individual Development program.

### Room Layout Guidelines

The ideal meeting room doesn't really exist. If it can handle 500 people, it won't be much good for 10. If it's an elaborately decorated board room, it's not the place for a supervisor to meet with his or her staff. The chairperson must make the best use of available facilities. That means setting up the room for optimum efficiency.

Try to choose a room appropriate to the size of the group. Make sure it can accommodate visual aids and other props. Make sure that it has satisfactory acoustics, ventilation, and access for participants.

Note the typical meeting room arrangements at

the end of this chapter. They contain recommended placements of lecterns, projectors, screens, and seating for different sized groups. The screen locations are also proper for positioning flip charts and video monitors.

Some participative or interactive sessions will call for open floor space or a flexible setup where tables and chairs can be moved aside to provide open areas.

In classroom style, all participants face the same direction, toward the instructor. Long rows of tables or individual desk surfaces are provided for participants to write. Allow each person at least two to three horizontal feet of table space.

In theater style, all participants face the same direction, toward the instructor. No tables are used. This is the setup for lectures or viewing when note taking is not required.

In conference style, participants sit at tables in a hollow square or open U configuration. Allow each person at least two to three horizontal feet of table space.

## Facilitating the Program

### I. Getting Started.

Again, it is emphasized that an individual's appointment as chairperson does not automatically make this person an expert on the topic of a training program. But if the chairperson is leading part of the program, this section is designed to help the presenter better prepare for the role as instructor. If the chairperson or members of the group will be called on to lead discussions, refer to the "Effective Discussions" section.

It is important to begin each session well prepared. When participants are involved from the beginning they tend to be more relaxed and open to new ideas. The information given them should fuel their interest in learning the subject matter of an ID program.

Use poster boards and make up a chart on which to post the names of persons registering for the program and keep it to reflect attendance for purposes of awarding diplomas at the conclusion of the program. This calls attention to persons involved in the Individual Development programs and, by conspicuous absence, reflects on those not yet involved. Add more when needed to keep visual evidence of all who participate.

### II. Keep Participants Interested.

- a. Respect the time commitment of your participants. Start on time and end on time.
- b. Encourage participants to establish written

goals on what they hope to derive from the course or behavior they hope to change. Have them individually evaluate their own progress along the way. NOTE: A person's goals and self-evaluations are very personal. Let them volunteer to discuss their goals if they wish. Never attempt to look at goals and evaluation sheets or force discussions about them.

- c. Three or four sessions into the program, ask for examples of how the work sheets, handouts, or workbooks have helped progress toward a goal which is not too personal to talk about. Personal examples of progress help stimulate the interest of others who may not be making as much progress as they would like.
- d. Check the Recommended Reading list for books that may be available at a library or book store. Recommend those found helpful.
- e. Urge participants to spend a few minutes each day with their goals. Five or ten minutes is all it takes. Giving thought to goals each day feeds the mind. The mind will provide answers to problems and plans for progress.
- f. Plan ahead. Be well prepared. Have an agenda for each session and use it to keep the program moving.
- g. As group leader, the chairperson should be studying and filling out their own workbook, evaluating his or herself, and actualizing his or her goals using a goal sheet as a guide.
- h. If a member misses a session, telephone and tell him or her what was missed, and that other members needed their ideas.

### III. Chairperson Steps to Ensure Readiness.

- a. If using a workbook, read the entire workbook. Read it BEFORE starting the program. Get the "big picture" of the program and its methods.
- b. Make sure the meeting place fulfills all needs and will be available at the scheduled meeting times.
- c. Use the goal-setting process to help prepare for each session. Ask these questions:
  1. What is the purpose of this session?
  2. What should be accomplished in this session?
  3. How can objectives be achieved?
- d. Re-read the appropriate portion of the workbook or background materials before each session so the subject is fresh. Read the comments and discussion leader questions in this guide



- that relate to the training.
- e. Prepare an outline for each meeting giving the amount of time each portion will take. Use suggested discussion questions.
  - f. Prepare a checklist of meeting needs for each session. (A sample is included in this guide.)
  - g. Make arrangements with any guest speaker that is being used.
  - h. Read some of the recommended reading to increase understanding of the Individual Development program's techniques.

#### **IV. General Preparation Checklist:**

- Project approved by Board of Directors
- Meeting dates set
- Time set
- Meeting place set
- Program fee established (not all programs must have a fee)
- Promote the program using all available resources
- Secure materials
- Materials arrived
- Kickoff planned
- Kickoff materials ready
- Speakers arranged
- Arrange for chapter plaques or trophies
- Program fee collected
- Diplomas ordered
- Thank-you notes written and mailed
- CPG completed

#### **V. Outside Resource People**

There are several people in the community recognized as successful by the members and the participants. These people exemplify the areas and techniques discussed in an Individual Development program. Identify those people who effectively use self-awareness and evaluation, goal setting, proper personal planning, and the skills discussed in the subject matter. They might be a coach, banker, mayor, or other elected city official, a corporate executive, a state Junior Chamber officer, training director for industry, or any successful businessperson who knows what they want and how to get it.

Any of these people could be effectively used as guest speakers at any Individual Development program. Every community, no matter what its size, has some of these people.

When approaching these people, give them the courtesy they deserve. Obtain an appointment and tell them face to face what the Junior Chamber is doing in

the area of personal growth and that they have qualities that can help spark young men and women to strive for greater accomplishment. Be sure to give them all the details about the meeting such as time, date, location etc. If they are to be the keynote speaker for the session, they may or may not wish to stay for the group discussion. After they have spoken for 10-15 minutes, allow them the opportunity to leave before the group discussion begins. Always remember that an Individual Development program is not a lecture series but instead a group discussion program; however, short talks by successful people can effectively open the door for more meaningful discussion. Be sure to send all guest speakers a thank-you letter or note.

#### **VI. Concluding the Program**

Distribute the program evaluation and allow time for the participants to complete it. Begin the wrap-up after participants have been given time to complete and return the evaluation.

Participants who have regularly attended sessions are entitled to receive a handsome diploma indicating completion of the Individual Development program. When determining the enrollment fee, include enough to cover the cost of the diplomas. Diplomas and certificates of completion are available from many sources, including the Junior Chamber Products Catalog.

Finally, thank the guest presenter, the members, and guests for taking time to participate in this ID program.

## **Effective Discussions**

This information is useful to course instructors and to participants who will facilitate smaller discussions, buzz groups, or brainstorming sessions.

#### **I. Role of the Leader in Group Discussion**

- a. Analyze the group (What has happened at previous discussions? How much do members know about the topic?)
- b. Explain the discussion method (photocopy and distribute to members)
  1. Remember, the discussion is a cooperative venture in serious conversation. It succeeds best when everyone feels free to join in at any time.
  2. Listen thoughtfully to others. Ask for explanations when needed.
  3. Speak when having something to contribute to the discussion, but don't monopolize it.

4. Under usual conditions, don't speak more than a minute at a time.
5. If you don't understand something, say so; perhaps there are others who don't understand it either. Ask for an example.
6. If disagreeing with what is said, say so frankly, but in a friendly way.
7. Don't wait to be called on, especially at the beginning of the discussion.
8. Remain seated while speaking and address other members informally.
9. Come to the meeting with the intention of taking part.
10. Don't expect an important question to be settled in one discussion.

c. Secure information

1. Read and accumulate additional resource materials on the topic.
2. Suggest appropriate materials for participants to read.

d. Methods to start discussions

1. Distribute brief items of information to be read at the beginning of the meeting.
2. Ask members who have had first-hand experiences related to the topic to speak for two minutes at the end of the leader's opening statement.
3. Provide a member with a short "situation story" illustrating the problem (topic), or how it was dealt with elsewhere, to be read at the proper place in the discussion.
4. Have two or three members ready to act out (role play), in three or four minutes, a scene illustrating the problem.
5. An introduction may be built around a map, graph, or picture.
6. Prepare a list of true-false statements about the topic to check the accuracy of the member's information.
7. Prepare a list of agree-disagree statements designed to draw out the member's opinions and beliefs about the topic.

- e. Prepare a discussion outline. Although the informal group discussion proceeds with a minimum of organization, the leader should have an outline to guide the conversation.

## II. Personality Traits of a Good Discussion Leader

- a. Ability to think and act quickly
- b. Ability to get along with others
- c. Respect for the opinions of others
- d. Willingness to remain in the background
- e. Freedom from prejudice

## III. The Knowledge and Skills of a Good Discussion Leader

- a. Knowledge of the discussion method
- b. Knowledge of evidence and reasoning
- c. Knowledge of the topic
- d. Skill in asking questions. The following are examples of how to ask questions:

1. To call attention to a point that has not been considered: "Has anyone thought about this phase of the problem?"
2. To question the strength of an argument: "What reasons do we have for accepting this argument?"
3. To get back to causes: "Why do you suppose Bobby takes this position?"
4. To question the source of information or argument: "Who gathered these statistics that you spoke of? Do you know that as a fact, or is it your opinion?"
5. To suggest that the discussion is wandering from the point: "Can someone tell me what bearing this has on our problem?" "Your point is an interesting one, but can't we get back to our subject?"
6. To suggest that no new information is being added: "Can anyone add anything to the information already given on this point?"
7. To call attention to the difficulty or complexity of the problem: "Are we beginning to understand why our legislators haven't solved this problem?"
8. To register steps of agreement (or disagreement): "Am I correct in assuming that we all agree (disagree) on this?"
9. To bring the generalizing speaker down to earth: "Can you give us a specific example on that point?" "Your general idea is good but I wonder if we can't make it more concrete? Does anyone know of a case..."
10. To handle the impatient, cure-all

- member: “But would your plan work in all cases? Who has an idea on that?”
11. To suggest that personalities be avoided: “I wonder what bearing this has on the question before us?”
  12. To suggest that some are talking too much: “Are there those who haven’t spoken who have ideas they would like to present?”
  13. To suggest the value of compromise: “Do you suppose the best course of action lies somewhere between these two points of view?”
  14. To suggest that the group may be prejudiced: “Is our personal interest in this question causing us to overlook the interests of other groups?”
  15. To draw the timid but informed member into the discussion: “June lived for quite a while in Spain. Suppose we ask her whether she ever saw...”
  16. To handle a question the leader can’t answer: “I don’t know. Who does?” “I don’t know the answer to your question, but I will find an answer for you.”
  17. To encourage a speaker to talk with the group, not at the leader: “Don’t you think you’ll be heard better if you face the rest of the group?”
  18. To cut off a speaker who is long winded: “While we’re on this point, let’s hear from some of the others.” “Can we save your point until later?”
  19. To take the play away from a verbose member: “You’ve raised a number of interesting points which should keep us busy a good while. Would anyone else like to comment on that?”
  20. To help the member who has difficulty expressing himself: “I wonder if what you’re saying isn’t this...?” “Doesn’t what you’ve said tie in with our subject like this...?”
  21. To encourage further questions by

friendly comment: “That’s a good question. I’m glad you raised it. Does anyone have an answer?”

22. To break up a heated argument: “I think we all know how Jones and Smith feel about this. Now who else would like to discuss the issue?”

#### IV. Conducting Group Discussions

The group discussion leader is responsible for:

- a. Getting the session started. Opening sentences set the stage for the entire discussion. Ask a question likely to start discussion. If this fails, ask another.
- b. Defining the topic. Perhaps discuss what certain key words mean and agree on how they are to be used.
- c. Keeping the discussion on track. If the discussion rambles, the leader is no leader. At the same time, the leader should not hold too rigidly to the outline.
- d. Making occasional summaries:
  1. To check needless repetition.
  2. To bring a random conversation back to the subject.
  3. To record apparent areas of agreement or disagreement.
- e. Encouraging general participation.
- f. Keeping the discussion from becoming one-sided. Sometimes the leader must invite opposing arguments to allow a minority-view member to join.
- g. Getting to the root of the matter. When the leader feels the discussion is not getting below the surface, an attempt should be made to ask probing questions and call attention to the lack of evidence or the weakness in reasoning.
- h. Remaining in the background. Make suggestions instead of giving directions; ask questions instead of answering them.
- i. Concluding the discussion:
  1. When the time announced for adjournment has arrived.
  2. With a summary, but reflect a consensus only if there is real agreement, and give fair coverage of divergent views, using tentative language to allow members to offer suggestions or corrections. A good summary will send the members home with the feeling that they have made progress.

- j. Evaluating the discussion. Did the discussion stay on track? If not, why? How many members spoke? Did any try to dominate the meeting? Was the evidence sufficient in quality and quantity?

## Role Playing

### USES

1. To introduce an idea
2. To gain insight into human conflicts
3. To teach human relations
4. To teach interviewing or selling techniques
5. To bring understanding of another point of view

### STEPS TO BE FOLLOWED

1. Select a timely problem involving differences of opinion or position.
2. If possible, select people to play roles who hold a view opposite from the role they play.
  - a. Knowledge of individual personalities is important.
  - b. Select the more outgoing individuals.
  - c. Avoid unpopular people in unpopular roles.
  - d. Give the participants character names to use rather than their own.
3. Set the situation for an emotional scene.
4. Position actors in center of group if room permits or in plain sight of all.
5. Start action.
6. Stop action as soon as major points are presented or discussion gets off the track.
7. Have actors return to their places.
8. Have group evaluate the situation and possible solutions.

### SUGGESTIONS FOR ROLE PLAYING SITUATIONS

1. Selling someone on our aspect of personal growth:
  - a. self-evaluation
  - b. goal setting
  - c. planning
  - d. various personal skills
2. Individual complaints to officers.
3. Selling the benefits of the Individual Development program to the president of a civic organization or business.
4. Selling Junior Chamber volunteerism and its benefits to a corporate executive or city mayor.
5. A Director calling a chairperson on the carpet

for not getting the job done.

*NOTE: Make up three or four situations that have particular application to the group.*

## Mini Speeches

If the chairperson decides to use these, everyone should participate. It may serve as the beginning of a good Speak-Up program for the chapter.

### METHOD

Participants are numbered, beginning with one. The first draws a written topic (prepared in advance) and must talk on it for 60 seconds, standing and facing the group.

Each in turn draws a topic and speaks. (Works best if the leader does not allow them to draw topics before standing, ready to talk.) Applause should be encouraged.

Topics should be varied, some humorous, some timely, controversial events, etc.

Note attempts to use effective speaking methods, even though no time was allowed for preparation. For example, did the speaker begin with an attention getter? Was an effort made to organize thoughts? Did the speaker appeal to logic? Relate to the audience? Did the speaker attempt to summarize?

The point of this exercise is not perfection, obviously, but the talks do offer an opportunity to evaluate each participant's familiarity with effective speaking techniques and to discuss briefly the use of such techniques.

## Brainstorming

### USES

1. To bring out many ideas quickly
2. To encourage group participation
3. To gain greater representation of ideas
4. To encourage creativity during a meeting

### STEPS

1. Be sure a chalkboard, flip chart, or overhead projector, transparencies, and pens are available.
2. Appoint a recorder to write responses on the board, chart, or overhead. (Sometimes two recorders may be used with the moderator alternating responses between them.)
3. Announce that the brainstorming technique will be used to get ideas on the subject.
  - a. Ideas should be given as fast as they are thought of.
  - b. Do not wait to be recognized to

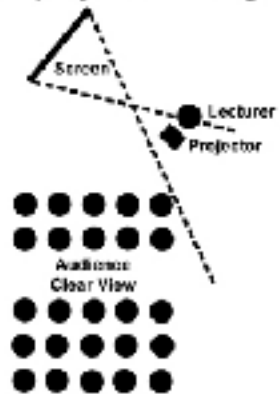




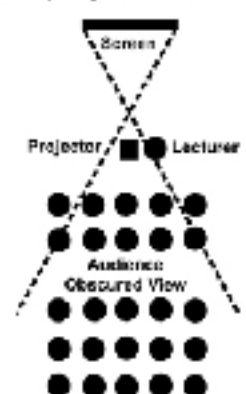


# Suggested Room Layouts for Individual Development Programs

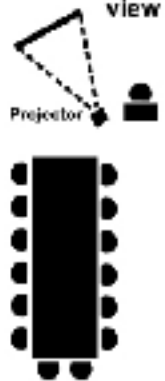
Best screen-projector arrangement



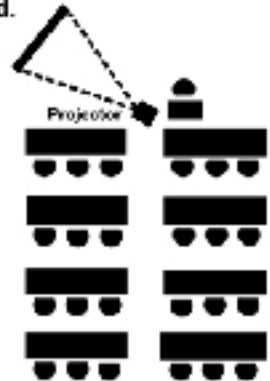
Poor screen-projector arrangement



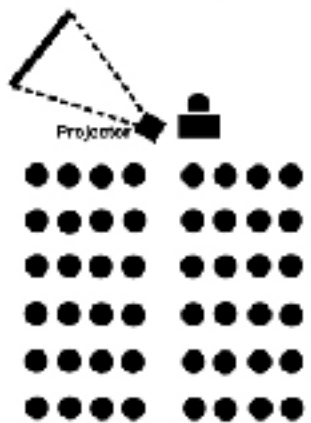
When using a projector, arrange the room so the audience's view of the screen is not obstructed.



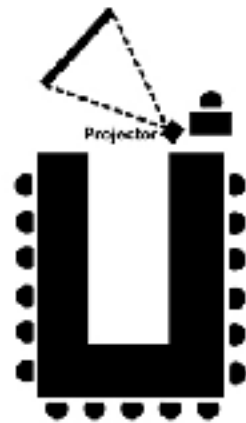
*Center table arrangement.* Suitable for under 20 people. This set-up promotes discussion and is best for long meetings.



*Classroom arrangement.* This is a standard set-up, suitable for any size audience.



*Auditorium/theater arrangement.* Suitable for any size audience but most efficient for large groups.



*U-table arrangement.* Suitable for 30 people or fewer. This arrangement is ideal for group discussion and interaction.



The United States Junior Chamber®

# Training Task Force

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The following **FREE** training modules, developed by the USJC Training Task Force, are available through the USJC National Service Center. Please call **800.JAYCEES** to request a copy.

The Final Chapter  
Relationship Recruiting  
Year-End Goal Setting  
If You Build It ...  
The AIM Program  
30 Checks, What's Next?

Vision, Mission, and Strategy  
Unknown @ Home  
Corporate Recruiting  
Nuts and Bolts Resource Guide  
Membership Guide

Extension Blueprint  
Triage 107  
Tool Time  
No Time To Lose — A Guide  
for Managing Time

The Plan  
Jayteens Guide  
Program Managers' Training  
Stress Management

The following training modules are available through the Junior Chamber Products Department.  
For prices and ordering please call **800.331.3240**

## **Set I**

Team Development  
Managing Change  
Communication, Planning, and  
Involvement

## **Set IV**

Team Tuning  
Leadership and the Team  
Working with Your People  
Raul's Italian Restaurant  
It's All Greek to Me

## **Set II**

Group Decision Making  
Leadership — Coaching,  
Counseling, and Confronting  
Driving Performance — Measuring  
Effective Meetings

## **Set V**

Making Heroes of Your People  
Unrestrained Brain  
Sharing the Experience  
People Puzzles

## **Set III**

Team Leadership  
Managing Multiple Priorities  
Sales and Service  
Managing Negative Thinking  
and Conflict

## **Set VI**

Super 7 — 7 Steps to Effective  
Chapter Management  
30 Checks, What's Next  
Shoot for 30

**FOR MORE INFORMATION:  
[www.USJAYCEES.org](http://www.USJAYCEES.org)**



# PRIME

## THE JCI INSTRUCTOR'S COURSE

### FROM THE JUNIOR CHAMBER INTERNATIONAL (JCI) TRAINING INSTITUTE

*Does the chapter have members interested in training?*

Run a **PRIME** course\* in the state for fellow members — and invite members from nearby states.

Requests for **PRIME** training must be received by JCI in Coral Gables, Florida, at least two months before the scheduled training date.

**PRIME** is a two-day (minimum) course designed for Junior Chamber members who want to develop training skills, but have little or no experience in training.

After successfully completing **PRIME** and documenting 50 hours of training, a trainer may qualify to take **EXCEL**. **EXCEL** is a more intense three-day course that further explores training. Its topics range from motivational techniques to promotional opportunities in the international marketplace. **EXCEL** also examines the role of the trainer as developer, manager, and marketer of adult learning.

To find out more, contact the Director of Training and Education at Junior Chamber International, Phone: 800.545.6982. [www.juniorchamber.org](http://www.juniorchamber.org)

*\*NOTE: **PRIME** is often run during JCI area conferences, World Congress, and NOM meetings. **EXCEL** is run during JCI area conferences and World Congress.*



THE UNITED STATES JUNIOR CHAMBER®

# THE BOOK: Project Management

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- **Make It Happen**
  - **The Chairman's Planning Guide**
  - **Committee Chairpersons**
- 

## Make It Happen

Projects are what captures the attention of the community. If projects are good, then the chapter's image in the community will be good. Conversely, if the project suffers from poor planning and implementation, the chapter's external image will suffer as well. This means it is doubly important that projects go well.

Beyond the chapter's public image, the members benefit from successful projects with increased self-confidence and enhanced skill levels.

For a project to be successful, it must be well-planned and have the support of the members. The good news is that a simple format for running a successful project is available. **The Chairman's Planning Guide (CPG)** provides 10 questions that must be asked and answered. The CPG takes committee chairpersons through every stage of the project, from initial planning to final thank-you notes. However, project chairpersons should be trained concerning how to effectively complete the CPG. The sooner in the year this is done, the better it will be for the chapter.

Along with CPG training, chairpersons should be trained in ways to effectively work with people. Differences of opinion will always exist, and there will always be those who fail to follow through. If not properly handled, these can become major personality clashes that hinder the chapter's growth and accomplishment of goals. Training chairpersons in people skills is the best way to keep things running smoothly.

## The Chairman's Planning Guide (CPG)

**The Chairman's Planning Guide (CPG) is a 10-step tool used to plan and evaluate a project.** Every project the chapter runs should utilize this process. In addition, officer responsibilities such as dues billings or the newsletter should have CPGs to document activity. Please see the National Awards Manual for a complete description of each step in a CPG.

## Committee Chairpersons

Developing the individual is the primary goal of the Junior Chamber. Being a committee chairperson is an excellent way to reach that goal by strengthening some critical manage-

ment skills. Committee chairpersons will learn to set goals, make decisions, develop plans, run meetings, and work with others, all with the result of helping others. The practical skills gained can apply to all phases of life.

**There are two basic types of projects:**

- **RECURRING**
- **NEW**

The recurring project should be in the chapter's plan of action for the year and should already be in the chapter budget, while new projects may not be in the chapter's plan and may not be considered in the budget.

Whether it is a new project or a recurring one, the first task is to talk with the chapter officer assigned to that area. Establish an immediate channel of communication. The officer will always have thoughts and ideas concerning the project. This relationship should last the length of the project and be one of guidance, direction, and assistance when needed.

### The Recurring Project

If the project is recurring, the assigned officer should tell the chairperson if any money has been appropriated in the year's planned budget and any other requirements predetermined by the year's plan of action.

If a Chairman's Planning Guide (CPG) was prepared for the project the previous year, get a copy and read it before talking to last year's chairperson or committee members and before meeting with your committee. Pay close attention to the section offering recommendations for subsequent years.

*Note: Always view a prior year's CPG as a tool. It is a report on how a project was done in the past, not a plan for the future, so don't let it stifle creativity. Ask the following questions:*

- Is there still a need for this project?
- How can the purpose of this project be fulfilled better than was done in previous years?

Even though the project is in the chapter's plan of action, it's good to take a fresh look and see if a real need exists for the project to be run again. If the chairperson honestly feels there is no need, tell the assigned chapter officer immediately, because the chairperson's opinion could be right.

After determining the project's necessity, reviewing all prior year's materials, and meeting with last year's chairperson and/or committee members, review what must be done with the



assigned officer.

A committee should then be appointed before the planning section of the CPG is completed. This enables the entire committee to be part of the detailed planning process, greatly enhancing its commitment to the project. Some tips on obtaining committee members are discussed later in the subsection titled, "The Committee."

### **The New Project**

If this is a new project, all available data concerning the project should be gathered. Call other officers and members to determine if they wish to be involved in the project and if so, what resources they can supply. If the project is part of a program promoted by The U.S. Junior Chamber, obtain a Junior Chamber Products Catalog from an assigned chapter officer, and use it to order any needed materials. It should also be determined whether a state Junior Chamber officer is servicing the project area.

**After the basic information is obtained, determine the following:**

- Purpose of the project
- Specific goals to be accomplished
- Net cost to the chapter
- Estimate of income, if the project is a fundraiser
- Number of members needed for the committee
- Number of members needed to assist or participate on the project

Once this is done, there should be enough information to complete the planning questions of the CPG. If this is the chairperson's first CPG, the assigned officer should help in its preparation, and if necessary, to assist in the presentation itself.

One of the most common reasons projects are not approved is because of a lack of funds. If the project costs money and funding is unavailable, identify alternative funding sources before meeting with the Board.

### **Determining Committee Size**

When the CPG is completed, consider the number of members needed and formulate general job descriptions for each position. Begin by making a list of major actions that must occur to make the project successful. The following sample list identifies some of the items that should be included:

- Secure facilities
- Publicize event
- Obtain funds
- Arrange for and schedule personnel
- Print necessary items
- Arrange for meals
- Take care of VIPs
- Arrange for liaison with any other group involved
- Handle money
- Register people
- Obtain special equipment

- Record committee's activities

Once the major activities have been listed, estimate the time it takes to accomplish each. Then combine actions into specific jobs so common items are handled by one person and each job requires about the same amount of time. As the job descriptions are created and the number of people needed on the committee is determined, bear in mind that the bigger the committee, the harder it is to maintain control.

### **Presentation to the Board**

When presenting a new project for approval to the chapter's Board of Directors, be sure the presentation is clear, concise, and complete. As mentioned earlier, the Board is interested in the following:

- Purpose
- Goals
- Income and expenses
- Personnel requirements

The Board considers the whole chapter before approving new projects. For this reason, expect discussion on the following issues:

- Are the purposes and goals of the project consistent with those of the chapter?
- Is the project of true value to the members and/or community?
- If the project is not a fundraiser, where will money for expenses come from?
- Does the project's timing conflict with other projects?
- Does the chapter have enough members to support this project?
- Is there a financial risk? If so, how much?

### **The Committee**

When the time comes to select the committee, talk to the assigned chapter officer. Discuss the best way to recruit needed people. Don't assume the committee will suddenly appear from nowhere. Determine at the outset just how the committee will be recruited. The best method may include one or more of the following:

- Have the Board of Directors appoint them
- Have the Chapter President appoint them
- The chairperson recruits them from the membership
- Ask for volunteers/review member surveys for interest

Committee members are sometimes selected because of their personal interest in the subject to be addressed. Other times, it's important to choose members with special abilities or technical knowledge.

As the committee is recruited, some members will be ready to join in immediately, while others may need a bit of persuasion. The more specific the descriptions are about the jobs that need to be filled, the easier it is for a member to decide. When selling an idea to a potential committee member,

be enthusiastic. If the chairperson doesn't appear to be "sold" on the project, don't expect anyone else to "buy" it.

### **Presentation to the Membership**

After the Board approves the project, it needs to be presented to the membership. The presentation should help familiarize members with the project, inform them of its value, and enlist their support. Be sure to cover the following in the project presentation:

- Purpose and benefits
- General description
- Location and date
- Personnel requirements
- Costs and revenue
- Publicity and recruitment value

**Be clear, concise, complete . . . and enthusiastic!**

### **Chairing the Committee**

The key to a smoothly operating committee is the chairperson's ability to lead by example. Be willing to take the initiative. The rest of the committee will follow the chairperson's cue: if he or she does nothing, they'll do nothing. Fulfill the responsibilities not only to the committee as a whole, but to each individual member. Be prepared to assist committee members at any time.

Always remember the chairperson is the coordinator and motivator, not the dictator. The committee members most likely have jobs and families that come first. A good chairperson insists on cooperation that doesn't interfere with those two primary responsibilities. Get to know the members and assign job responsibilities that coincide with personalities, being sure to delegate a certain amount of authority.

Impress upon each member that the success of the project depends on how well each responsibility is fulfilled. Put all job descriptions in writing; ask the members if they have any questions; let them know that the chairperson is there if they need help; then let them do their jobs. The most important part of effective committee management is the chairperson's ability to follow up. The only way to be sure a committee member is fulfilling responsibilities is to ask.

Following up can be difficult because many people resent being "checked on." Use as much diplomacy as possible, but never let a person's reaction to questions be a reason for not following up. Chances are, those who complain loudest about being watched over are the ones not doing what they are supposed to do when they are supposed to do it.

### **Motivating the Committee**

The chairperson is the prime motivator of the committee. However, it is difficult to motivate others; they must motivate themselves. Still, the chairperson can create a positive environ-

ment in which self-motivation easily occurs. It starts with the following "Keys to Motivation:"

- Consider each member and his or her job important
- Praise the efforts of each member
- Ask for advice
- Listen to and respect all opinions
- Provide meaningful assignments
- Give encouragement
- Be sure each member knows what is expected

Even with a motivational environment, some problems occur. An effective chairperson can recognize and deal with these situations before they become problems. Most of the committee members will work willingly and easily with each other. One of the biggest benefits derived from being a chairperson is working with a variety of personalities to form a team.

If a committee member doesn't perform no matter what approach is tried, consult the assigned chapter officer. Don't let one individual spoil the attitude of the entire committee.

### **Meeting with the Committee**

The success enjoyed in all committee meetings is the chairperson's responsibility. The main rule is every meeting should have a definable purpose. Meetings should have one or more of the following goals:

- Make specific committee decisions
- Solve specific problems
- Check progress of all actions to date and to discuss upcoming events

Never have a meeting just to have one. Always give the members plenty of advance warning and mail notices or call members individually.

***Another rule:*** If a meeting is worth having, it's worth having an agenda. An agenda is not something only parliamentary procedure wizards know how to prepare, it's a list of things to happen at the meeting. If possible, prepare the agenda and mail it to the committee before the meeting. If there's no time, be sure the chairperson has one. A handwritten agenda is fine in such circumstances. Try to adhere to these basic committee meeting guidelines:

- Start on time
- Stick to the agenda
- Keep it informal
- Be sure everyone is heard
- Keep the meeting moving at all times
- Adjourn on time

Appoint someone as secretary at the first meeting. Minutes make it possible to follow up on assignments. Copies of the minutes should go to each person with an assignment. Clippings, photos, and printed matter should be placed in the committee secretary's hands to be submitted with the final report.