

JCI Training

Be Better.™

JCI Local Action Guides

The JCI Guides for Local Administration
Version 1.0

JCI Official Publication





JCI Mission

“To provide development opportunities that empower young people to create positive change.”

JCI Vision

“To be the leading global network of young active citizens.”

About JCI

JCI is a worldwide community of young active citizens ages 18 to 40 who share the belief that in order to create positive change, we must take collective action to improve ourselves and the world around us. With over 5,000 Local Organizations in more than 115 countries and territories, JCI forms a vibrant international network with nearly 200,000 members. Engaging in activities ranging from community development to international projects, members demonstrate their social responsibility and improve themselves through participation, leadership and action. The global citizens of JCI are committed to becoming better leaders to build a better future for all.

© Copyright by JCI: All rights reserved.

This publication or parts of it may not be translated in any other language without the express permission of the JCI Secretary General.

Published by

Junior Chamber International (JCI), Inc.

15645 Olive Boulevard –
Chesterfield, MO 63017, USA

Tel: +1-636-449-3100

Toll free (from USA only): 1-800-905-5499

Fax: +1-636-449-3107

E-mail: training@jci.cc - website: www.jci.cc

JCI Local Action Guides

The JCI Local Action Guides are a series of short publications with clear and specific suggestions on most matters that affect the leadership and administration of a JCI Local Organization. They can be used in training courses and also printed separately and handed to the officers for quick reference on their responsibilities.

Content

Membership

- The Individual Member
- Membership Recruitment
- Membership Involvement
- Membership Retention
- Starting a New Local Organization

Officers

- Local Board of Directors
- Local President
- Local Immediate Past President
- Local Executive Vice President
- Local Vice President
- Local Secretary
- Local Treasurer
- Local Director

Administration and Management

- Local Administrative Structure
- Local Constitution and Policy
- Local Strategic Planning
- Local Plan of Action
- Budget and Sponsorship
- Local Protocol

Marketing and Communications

- Marketing Plan
- Internal Communications
- External Communications
- Website Administration

Meetings

- Planning Meetings
- Local Meetings
- Chairing Meetings
- Parliamentary Procedures

Projects

- Local Project Planning Process
- Project Plan of Action

JCI LOCAL ACTION GUIDE

The Individual Member

To fulfil its Mission, JCI counts on hundreds of thousands of members across the world. Each individual member is a pillar on which the Mission of the organizations rests. Each member is the most valuable asset of the organization, and you have a significant role to play in the success of the organization.

The ultimate goal of JCI is to offer individuals the opportunity to create positive change in their communities. By doing so, the individuals also improve themselves. Your JCI membership will bring you great personal development. It can be the means to the total development of your personality, and new horizons will open to you. As a member, you will learn to do so much more than you would in other associations.

In the prime time of your life, grasp the opportunity to become a person with real and varied skills, and most importantly, become an active citizen who will contribute to creating positive change in your community.



RESPONSIBILITIES

JCI members share a common set of values. A JCI member must strive to be a true reflection of the JCI Values.

As a JCI member, you should have three goals:

1. To be the **best member** possible of your Local Organization
2. To make your Local Organization the **best** in JCI
3. As a dedicated member, to help your Local Organization make your community the **best local community** in the world.

In achieving these goals, you do not have specific or constitutional duties as officers and Board members do, but you do have very real responsibilities. A few are listed below:

Be Active

Membership in JCI is different from most other organisations. JCI membership offers so much to its members: skill training, personal development, community recognition and the satisfaction of being deeply involved in programs with lasting benefit to the community. However, these benefits are only available to the active members, those who attend meetings and who work hard on all assigned projects.

Be Committed

There is no such person as a "good, half-hearted" JCI member. The JCI movement has a philosophy, goals and purposes expressed in the JCI Mission. It requires a commitment to JCI ideals, it demands dedication to hard work, and it calls for a deep understanding of the problems of people.

If you can make this commitment, you will be an invaluable member of your Local Organization.

Be a Contributor

There are many members of JCI who are bursting with good ideas, who are sound thinkers and who can contribute to the decision-making process. However, they are often silent at meetings, perhaps because of shyness or fear their ideas will be ridiculed. Too often the really good ideas come out after the decision has been made.

Your Local Organization needs your contribution. Acquire the skill of speaking in public, think out ideas thoroughly, and present a reasoned argument in support of your views. Be prepared to listen to opposition, and accept any good points that are made. Aim to be a member who is listened to and whose ideas are valued.

Be Efficient

Efficiency is one of the keys to advancement. It is important that, whatever task you have, you understand what you have to do, you participate fully with other members and you do your part to the best of your ability. Do not be afraid to ask if you do not understand. Do not hesitate to seek help if you feel this is necessary.

There is no position in JCI that is more important than any other, and each member is one link in the human chain of achievement. The organization needs the floor member who does what he or she has to do conscientiously.

TO BE DEPENDABLE

The member who can be counted on at all times, the one on whom others can depend, is the member who will go right to the top.

Many good projects fail because only one person let the team down. Most JCI activities require teamwork, and it is up to you to pull your weight and do what is expected of you.

At the same time, do not become so enthusiastic that you undertake more than you have the time to do. Having too much to do is as bad as doing nothing at all. The result is the same.

RECOMMENDATIONS

It is important that you learn as much as you can about JCI so you can participate fully. Learn the history of your Local Organization, your National Organization and JCI. Find out all you can about recent activities and projects. Knowing what has been done in the past will not only give you ideas but will help you learn from the experience of others and recognize pitfalls to avoid. Study the Constitution of your Local Organization, its structure and organization. Attend as many regional, national and international meetings as you can. You will learn not only what is happening at those levels but also from exchanging experiences with fellow members. Above all, use every opportunity to learn new skills and extend those you already have.

Utilize

Your Local Organization is a personal development organization, and you will benefit immeasurably by taking advantage of the courses in personal development, leadership, management and skill training offered. The real learning, however, happens when you apply the new knowledge in real situations and you gain experience and more knowledge.

JCI is unique because it allows members the luxury of learning from mistakes, so do not be afraid to tackle something new. Even if you are not completely successful, you will find it of lasting personal benefit when you apply what you have learned to your work and personal life.

Organize

Being a JCI member is not entirely a spare-time activity, for being an active member of a good Local Organization can be very demanding of your time and your talents. Organize your time to give attention to your family, your job and your JCI career. It is wise to involve your family and your employer or business associates in your JCI activities so they can see the good work you are doing and the benefits you are gaining.

Move On

Because of its great demands, your period of active JCI life may be relatively short. When you know what JCI is all about, assess the time that you will be able to give to JCI, and set your personal goal, whether it's to be Local President, National President or JCI President. Plan your steps on the road to achievement, and then, putting all that you learn into practice, shoot for the stars.

However, always remember that the end of your JCI career should just be the beginning – the start of your personal commitment to create positive change in your community and your nation. Be a good JCI member today, and you can be an outstanding leader tomorrow.

SUMMARY

When you transform problems into challenges that you overcome, when you set objectives for yourself that you achieve, and when you merge the talents you now have with the skills you will acquire, you will attain personal growth that will give you a new dimension and a new way of life.

Consider the words of Thomas Wolfe:

"If a man has talent and does not use it, he has failed; if he has talent and uses only half of it, he has partially failed; if he has talent and learns to use the whole of it, he has gloriously succeeded, and knows a satisfaction and triumph few will ever know."

JCI LOCAL ACTION GUIDE

Membership Recruitment

In line with the JCI Mission of the organization, JCI Local Organizations exist to provide opportunities for young people. JCI Local Organizations must therefore continue to recruit young active citizens so they can take advantage of the opportunities to empower themselves to create positive change in their communities

Successful Local Organizations have a clear strategy for recruitment and never give up in their efforts to recruit young people.

Like anything else, life is a game of numbers. The more young people join a Local Organization, the greater the impact you can have in your community and the easier the task to create positive change.

A Local Organization needs to continually recruit new members for fresh ideas, to fill the positions of those who move on to higher offices and to replace those who left due to age limits or to assume leadership positions in the community.



THE RECRUITMENT PLAN

Appoint a Membership Recruitment Committee under the supervision of a Vice President with the following responsibilities:

1. Set realistic recruitment goals

Decide how many members can be incorporated in the current structure and can be absorbed by the current activities. Consider the members who will leave for many reasons, such as age, work, lost interest, moving, etc.

2. Decide what you have to offer

Look at the purpose of the JCI Local Organization and decide what kind of development opportunities that empower young people the Local Organization can offer to the members.

Evaluate the activities you have today and what would be needed to satisfy the aims of the members who want development opportunities.

3. Decide when you are ready to deliver it

The worse thing that could happen is inviting new members and when they join, the Local Organization is not ready with the activities planned. Ensure that everything is planned when the new members join.

4. Decide on the content of the recruitment message

Be ready to tell the JCI story in a vibrant and impactful way to potential members when you invite them. Ensure that the message is realistic and reflects the purpose of the JCI Local Organization.

THE IDEAL JCI MEMBER

Selecting the members who fit the JCI profile is not an easy task. It requires deep research and analysis of young people's behavior and actions. When looking for the member profile, consider these aspects:

1. Fits JCI Values and principles

Look for young people who demonstrate passion for the JCI Values and principles expressed in the JCI declaration of principles.

2. Wants to grow and constantly improve

Look for young people who are constantly looking for personal improvement, for new experiences, for new knowledge.

3. Is willing to help others

Look for young people who are volunteers for community service, belong to other young associations.

4. Is active in other associations

Look for young people who are active in other clubs, associations or organizations.

5. Has a potential leadership profile

Look for young people who are leading other associations or are always

at the front line on community issues.

6. Has the time and resources to be an active member

Look for young people who are involved in volunteer activities, cultural clubs, sports, other organizations.

ATTRACTING THE MEMBERS

Now that we know who they are and where they are, we need to decide what to show to get their attention.

1. Potential members must be the end-user of the activities

Plan a series of activities or projects where the target market is the end user of the product. Organize open day events, Organize business forums, take up booths at trade fairs or community fairs to promote your organizations and its activities, invite community leaders to meetings to discuss city improvements, etc., that will involve the target market. Find out what kind of activities would attract them to participate. No matter what you organize, your activities must be aligned to the Mission of the organization and must provide opportunities to empower your members and create positive change in your community.

2. Potential members must benefit from projects

Also, organize projects or activities where the target market benefits directly. Career improvement courses, special meetings with

experts and other related events will bring direct benefit to the target market. Find out what they are looking for and provide it to them.

3. Include potential members in the organization of the activities

If you already have selected some prospects, include them in the organization of those events. The involvement can be individually or you can invite another organization or association where the prospects are associated to help organizing the events. This will allow the current members to interact with the potential members.

Of course, make sure you showcase your organization in the best way possible, by carefully planning and professionally executing the project.

SUMMARY

If the Local Organization has a good image in the community and conducts projects targeting and for the potential members, most likely they will be willing to join when invited.

Depending on the average age of the current members, it would not be wise to recruit new members who are not close to that average. Of course, new members should always be younger than the average current members but the generation gap cannot be too big.

If the current average age is too high, work on bringing it down little-by-little. A drastic change may have dramatic effects on the membership.

JCI LOCAL ACTION GUIDE

Membership Involvement

New members are exactly that – new! They are still unaware of the enormous potential of JCI – the philosophies, mission and achievements. Nor will new members fully understand, for some time, the role they will play in the organization.

New members have yet to discover what their new Local Organization has done, is doing and should do in the future. This may seem like a list of handicaps. To the contrary – new members have three formidable assets on their side: *curiosity, enthusiasm and energy.*

If the Local Organization *satisfies the curiosity* with materials and answers, *encourages enthusiasm* with effective management and good projects, and *harnesses energy* with regular challenges and worthwhile activities, the new member should stay long enough to become an excellent young active citizen and a leader of the future.



RESPONSIBILITIES

There are two distinct parties responsible for the new member – the Local Organization leadership and all members.

Here are some suggestions for how both parties can best ensure that the new member is provided with the best possible environment for personal development and quality membership.

1. **Orientation** – Organize an orientation session for a small group of new members. Hold the session immediately after the member joins. It is recommended that one only becomes a member after going through an orientation to ensure they understand the Mission, Vision and Values of the organization.
2. **Sponsor/Mentor** – Assign an active and experienced member to be responsible for the needs of the new member.
3. **Family Involvement** – Ensure that the new member explains the organization and activities to his or her spouse, and encourage early family involvement.
4. **Member Interest Interview** – This can be a written questionnaire or an oral interview and is usually done during the orientation session or in the first few months. Record results in a membership file and update it regularly, especially for new members.
5. **Personal Progress Plan** – Using the form from the Individual Member Action Guide, prepare a Personal Progress Plan for the new member and review it regularly.
6. **New Member Project** – Organize the New Members Project Course from JCI. The new members will survey the community needs, brainstorm to decide on a project and select a project to be conducted by the new members. If other orientation is used, ensure that the new member organizes a brief project with a limited scope. This will serve as a means of recognition in the Local Organization and provide the opportunity to experience and accomplish a project.
7. **Basic Training** – Teach every new member these basic skills (other than those offered at the orientation program): parliamentary procedures for meeting participants, public speaking, project planning, presentation skills and basic protocol.
8. **Training Sessions** – In addition to the instruction contained in the orientation program and the basic training program, the new member has come to learn and benefit from the skills JCI offers any interested and enthusiastic individual. Check the JCI website for training courses that may be appropriate for the new members.
9. **Incentives and Awards** – Have an incentive program for new members to award them for participation in meetings and projects. However do not let the incentive program be the sole motivation for membership involvement. The Mission of the organization must at all times be the drive behind membership involvement.
10. **Exposure** – Let the new members introduce themselves at a general membership meeting to gain confidence. This is usually the debut of a long and exciting JCI career, and most new members will always remember their first introduction at the General Meeting. This could be

JCI LOCAL ACTION GUIDE: Membership Involvement

an overwhelming experience for some people. Be a good coach, and set the example for the members.

- 11. Assign Responsibility** – As early as possible, appoint the new member to a Project Committee so he or she will feel part of the team and have the opportunity to learn by doing.
- 12. Literature and Materials** – It is very important to give the new member literature explaining the organization and the benefits of membership. This will enable the new member to do some self-orientation.

RECOMMENDATIONS

1. The Local Organization must understand the aspirations of the new member. He or she wants to belong, to achieve, to be accepted, to enjoy membership benefits, to lead and follow, to be active and to be recognized occasionally.

2. Offer new members quality involvement, opportunities to involve their families, good reasons to commit time, money and energy, a chance to lead, opportunities for self-improvement and community involvement, high standards of performance; and lasting friendships.
3. Motivate the new member to attend and speak at the meetings, share ideas and aspirations with other members and learn about the rules of a meeting, etc.

SUMMARY

JCI is not just another voluntary organization. Almost 200,000 members in nearly 5,000 Local Organizations in more than 100 nations and territories have, since the foundation in 1915, made it the **best young people's organization in the world!**

Let your new members know very early that the rewards and opportunities of JCI membership are endless.



JCI LOCAL ACTION GUIDE

Membership Retention

Like the rest of society, your members are busy, mobile people. They are not prepared to make long commitments to unidentified tasks. They know what free time they have and will make themselves available only for specific tasks involving clear-cut periods of time.

The proliferation of volunteer organizations of every kind has made greater demands upon individual organizations to look after their members. Organizations must provide the opportunity to satisfy the objectives and aspirations that prompted members to join in the first place.

As soon as the organization loses its relevance to members, they may, even reluctantly, search elsewhere for other voluntary organizations to find the satisfaction they seek.

RESPONSIBILITIES

1. The only way the Local Organization can satisfy the needs and aspirations of its members is to know as much as possible about each one of them. Therefore, it is of vital importance that each Local Organization maintains a comprehensive, updated system of member records.
2. Because membership is the foremost reason why a Local Organization continues to exist, a qualified officer should be charged with the responsibility addressing the needs of members.
3. Orientation must be an ongoing process that is tailored to the needs of the new, the not-so-new and the experienced member. So, it is important to hold sessions for every type of member to maintain enthusiasm for membership in the Local Organization.
4. Supervision is of paramount importance to the member in a voluntary organization. It is difficult for members to be self-motivating for the full term of their membership. Supervision requires planning, skill and caring, and involves:
 - a. Recognition of accomplishments,
 - b. Identification of areas of improvement, and
 - c. Supportive work on improvement areas.
5. Ensure that every member has a personal progress plan, including leadership aspirations and personal development, and arrange to have an officer responsible for discussing this plan with each member from time to time.
6. Know the basic factors that cause an individual to leave the Local Organization, and make a list of reasons that are specific to your particular organization. Some basic reasons for leaving might include:
 - a. The member simply outgrows the organization
 - b. The program offers little interest to the member
 - c. There is a lack of involvement
 - d. Disillusionment
 - e. Lack of opportunities in projects and in the leadership of the Local Organization

Some specific problems for your Local Organization might include:

- a. Transfers to other parts of the country
- b. Increased competition from other Local Organizations
- c. Poor leadership
- d. Family needs
- e. New job responsibilities

Once you have identified the problems, prepare effective remedies, and act quickly to retain members before it is too late.

7. It is important for the entire membership to participate in a periodic evaluation of purpose and objectives. This will help the Local Organization to assess the needs for programs or leadership opportunities.
8. Avoid the danger of trying to be all things to all people. With so many different voluntary organizations, it is better to be more specific in your objectives; otherwise you may cause dissension by trying to cater to every individual need. The secret is to ensure the programs are in line with

JCI LOCAL ACTION GUIDE: Membership Retention

JCI's Mission and that all members understand their role in the accomplishment of that Mission.

9. It is a weakness in many Local Organizations that the membership is not made aware of the history, philosophy, Mission and achievements as well as the potential of JCI.

Gather plenty of literature for members to read. Invite past members to tell current members about the growth and past achievements of the organization. On their visits, national and international Officers should give members an update on activities at various levels of JCI. Make sure members visit the National Organization's and JCI's websites.

RECOMMENDATIONS

1. Have a Board membership evaluation meeting and discuss the membership situation, personal aspirations, the purposes and objectives of the Local Organization, how to recover non-participating members, and general topics that relate to the future management of an effective organization. Publish results or otherwise make them known, and act upon them.
2. Establish a Personal Development Committee responsible for training programs for the members.
3. Check that your Local Organization has many visible signs of membership participation and accomplishment, such as wall charts, awards and recognition, and reports.

4. Compile a comprehensive list of avenues for exploration by members of every vintage and classification that fall within the set objectives and programs of the Local Organization. For the new member, there is the opportunity to work on projects or attend training programs, such as the One-Hour Seminars. For the more experienced member, there are individual development programs, bigger projects and leadership opportunities in the administration of the Local Organization. For very experienced members, there are regional, national and JCI leadership opportunities, catalytic community projects and advanced individual development courses. For special members who display certain skills at the very highest level, the Local Organization should provide some opportunity that is both advantageous to the organization and the member, for example, preparation for public office.

SUMMARY

Like good leaders, good members are made, not born. The Local Organization must go beyond the principle of survival, because there will always be prospective members. What is needed is to establish a series of safeguards against program stagnation, friction among members, uncertainty over objectives, indifference in the leadership, breakdowns in communications, and a lack of strategic planning.

It is a well-documented fact that in every voluntary organization, the best results are still achieved by the faithful few. Despite this reality, accept the challenge to transform the "faithful few" into the "faithful majority."

JCI LOCAL ACTION GUIDE

Starting a New Local Organization

If an organization is good enough to join, it is good enough to share with others. If we do not share the benefits of individual development and community involvement with others, we are not satisfying the ideals of the JCI movement.

The world is not waiting to be introduced to JCI – we must compete against a whole range of factors – from apathy to other attractions and commitments. We will not attain a growing membership easily – it will be the result of persistence and hard work.



RESPONSIBILITIES

1. Discuss with your Board about whether the Local Organization is prepared to create a new one.
2. Carefully select an Extension Committee Chairperson – a member of your Local Organization who has a good personality, a successful JCI career, understands basic management techniques and is very enthusiastic.
3. Have the Extension Committee Chairperson select a competent and eager team of experienced and new members.
4. Assign certain responsibilities to the committee members (promotion and publicity, finance, meetings, speakers and trainers, charter night, follow-up, etc.)
5. Know thoroughly the National Organization's rules, policies and bylaws on extensions.
6. Select the exact target area and determine the precise boundaries of this district.
7. Immediately advise your National Organization, the assigned national Vice President and neighboring Local Organizations close to the target area of your intended extension project.
8. Prepare a plan of action to be submitted to the Board of Directors for adoption and support. Include a realistic budget.
9. Make the initial contacts in the target area with civic leaders, the Chamber of Commerce, business leaders, and leaders of other voluntary organizations.
10. Prepare a full analysis of the needs of the community in the target area. Prepare draft plans on community projects in that neighborhood. Use this document as a presentation to the mayor, civic and business leaders, and, eventually, to encourage prospective members.
11. Compile prospective membership lists from business firms, professional and trade associations, and sources where young people are most involved.
12. Select key persons. Invite them to your own meetings and to a special orientation meeting, such as the "New Members Orientation" seminar. They will become your initial local leaders.
13. Select a tentative Board of Directors for the prospective new Local Organization, and give them some very basic training and orientation on local management.
14. Hold the first orientation and make it a dynamic function. Explain JCI and its Mission, philosophy, opportunities, etc.
15. Hold the second organizational meeting and reemphasize the benefits of joining JCI. Discuss and try to approve the Local Organization's Constitution, and if approved, elect a provisional Board of Directors and a Charter Night committee.
16. Hold the first Board of Directors meeting and discuss issues such as budget, schedule of meetings, projects, affiliations, etc.

17. Hold the first membership meeting and officially adopt the Local Organization's Constitution, elect a definitive Board of Directors, and prepare the Charter Night program.
18. Hold the final Board meeting to prepare for the Charter Night meeting. Have the charter meeting and ensure it is a splendid affair.

RECOMMENDATIONS

1. **Organizational Meetings:** These must be organized to perfection. Choose top-quality speakers, selected from among JCI officers who are good speakers, or external spokespeople, such as local leaders, etc. Be sure to include a short social session after the meeting, and have sufficient documentation at hand to record the information about prospective members.
2. **Charter Night Meeting:** Ensure that it is a dignified and memorable occasion, and make maximum use of available publicity. Invite a good cross-section of guests representing local administration, business and other voluntary organizations. The installation of new officers, the presentation of pins, and the distribution of membership kit should be a well-organized ceremony that adds luster to the meeting.
3. **Affiliation Requirements:** Be sure you meet every requirement for affiliation to the National Organization so that there will be no delay in services from the national secretariat to the new Local Organization.

4. **Follow-Up:** Extending a new Local Organization is only the beginning. Appoint a Board member in each Local Organization to be liaison officer for one calendar year after the date of the meeting. Arrange a combined Board meeting at least once every quarter, and schedule a combined membership meeting at least three times in the 12-month period. Continue to provide speakers and experienced members to help organize training and projects for this period.

5. **Documentation:** Here are some examples of documents you will need as tools to do the job: JCI Local Organization Constitution Guide, Extension Manual, Parliamentary Procedures Guide, One Year to Lead Manual, New Members Orientation Seminar, membership application forms and affiliation papers, material for membership kits; sample agenda, Local Organization budget and minutes, national publications, and JCI, national and general JCI information sheets, Local Organization Toolkits, etc.

SUMMARY

"No one is more aware than I, in my present position; of the continuous need our country has for bold and able men to face the many complex problems of the future. It is a great assurance to know that such organizations as Junior Chamber are available to provide a reservoir of leadership from which the local community, and ultimately the nation, can draw to meet these needs."
(John F. Kennedy, USA President, 1962).

JCI LOCAL ACTION GUIDE

Local Board of Directors

It would be difficult for a Local Organization to meet every time a decision needs to be made. A Board of Directors is a smaller body elected by the members and given the authority to decide on their behalf. The Board of Directors also carries out the daily business of the organization.

The scope of the decisions of the Board must be restricted to those that are not at the level of the General Assembly.

The authority, decision making and responsibilities must always remain in the hands of the membership in the form of a General Assembly. A Board of Directors does not rule the local organization. Instead, it carries out the decisions and mandates of the membership.

A Board member is given the permission to make some decisions on behalf of the membership and can be held legally responsible for abuse of power of misrepresentation and misuse of the position.

RESPONSIBILITIES

A successful Local Organizations needs a high-performing team on the Board of Directors with the following qualities:

- Everyone knows the goals of the organization and his or her role.
- Everyone is committed to providing honest feedback.
- Each person on the team respects and values diversity of thought.
- The team develops trust and the ability to disagree without being disagreeable, and is willing to pitch in and help
- The team gets results.
- The team celebrates successes and achievements as a whole

A Local Board of Directors has the following basic responsibilities:

1. Establishes policies and guides, and supervises operations.

Members of the Board of Directors must constantly evaluate if the policies are still valid or effective. They lead and guide members and supervise to ensure effectiveness. The Board establishes policies within the local constitution to guide the Local Organization to run effectively, efficiently, legally and ethically.

The Board's role is to establish the framework within which the members can run activities. The Board identifies the scope of the activity, defines the critical issues to be addressed, establishes policy positions, determine priorities, sets targets and then lets the directors and project managers determine how to get the job done.

2. Provides leadership.

Each Board member will lead some members of the Local Organization, applying the leadership knowledge they already have and gaining more. But the most important part is the leadership the Board will show as a team as they lead by example.

Officers and directors often believe they know their roles as leaders, but they sometimes miss the point: that they are players on a leadership team. This is true even for the President, who needs to view his or her role as first among equals.

The Board and officers lead after developing a shared vision, sense of Mission and organizational plan. Personal agendas must be set aside. Volunteer leaders need to bring their opinions and passions to the Board table when issues are discussed, but once the Board has made a decision, individual directors and officers are obligated to support the Board's decision outside the Board room.

3. Provides direction through planning.

The Board is responsible for ensuring the Local Organization has a yearly plan of action and a clear, concise strategic or long-range plan that spans three to five years. The Board is not solely responsible for developing the plan but must be sufficiently involved to feel a sense of participation in its development.

Ownership of the plan is the key to success. All decisions of the Board and all actions of committees need to be linked to the implementation of the plan.

By equally distributing the activities throughout the year, the Board ensures that members will always have challenges and activities without being overloaded.

4. Ensures the financial integrity of the organization.

Transparency, honesty, efficiency and professionalism are the key words to keep the Local Organization finances sound and solid. Monthly reports on the finances must be circulated to the members to keep them informed on the financial situation of the Local Organization.

Perhaps the best-understood role of a Board is its responsibility for the fiscal health of the organization. To fulfill this responsibility, the Board needs an organizational financial plan that is tied to a strategic plan. The financial plan does not drive the strategic plan – these plans work vice versa.

The strategic plan provides the direction and sets priorities, and the financial plan simply states how resources are to be allocated to achieve the strategic plan.

To be able to link the financial plan to the strategic plan, the Local Organization must have a budgeting system that identifies income and expenses at a programmatic level. Then, on an annual basis, financial and programmatic performance can be linked, and adjustments to the strategic and financial plans can be made.

Finally, the Board's focus must be as much on the long-term financial plan as on the annual budget, ensuring the financial integrity of the Local Organization by looking long term, accumulating reserves at certain times and investing them at others.

RECOMMENDATIONS

Each Board member:

1. Participates responsibly.

Too many people are depending on the Local Organization's success for any single Board member not to carry his or her fair share of the leadership responsibility.

Board members cannot execute their

responsibilities without dedicating a substantial amount of time, including preparing for Board meetings, attending these meetings, doing follow-up work after Board meetings, attending Local Organization meetings, representing the organization within and outside the field, and doing the necessary reading and preparation between Board meetings.

Successful Board meetings are characterized by strong participation by all Board members – not domination by a few.

2. Evaluates at all levels.

An effective evaluation program examines performance in these areas.

Policy performance: Are the policies of the Local Organization relevant and current? Are mechanisms in place to ensure routine review of all policies?

Financial performance: Is the budget tied to the strategic plan? Is the budget monitored routinely by the Board and general membership? How successful is the Local Organization at achieving the budget each year?

Organizational performance: How successful has the Local Organization been in implementing the objectives in the strategic plan?

Every year the Board of Directors must evaluate if the current structure is still applicable and efficient. Changes in the number of members, activities, finances, etc, may result in the need to change the current structure. This will affect the finances and performance.

The Board of Directors **does not** change the structure but recommends changes to the General Membership for consideration or approval. The Board of Directors must constantly review the structure and its efficiency.

SUMMARY

Participation on the Board of your Local Organization is an honor and duty not to be taken lightly. The Board's responsibility is to achieve organizational goals in an effective and efficient manner through planning, organizing, leading and managing resources.

JCI LOCAL ACTION GUIDE

Local President

Only once in a lifetime does an individual become a Local President. It is both an honor and a responsibility. Your fellow members have elected you. Waste not a single moment to learn about your office and its various requirements. Leadership is already a quality you possess in part. The other part you must acquire through a combination of experience and learning.

It may be an easy task to be a good Local President, but you can make sure that it becomes a rewarding experience if you know the philosophy of your new position.

1. You are the leader, public relations figure and spokesperson of the Local Organization.
2. You are the liaison officer between your Local, National and international organization, as well as with other organizations.

RESPONSIBILITIES

Here are some responsibilities associated with the office of Local President.

1. Establish and maintain a sound **management** program.
2. Organize a regular **review** of the annual program of activities.
3. **Control** and **supervise** the affairs of the Local Organization.
4. Exercise some firm but friendly **control** over **major** projects.
5. **Organize** and **conduct** training for all your officers at the beginning of your year.
6. **Motivate** your Board of Directors and the general membership to perform their duties and responsibilities.
7. **Assist** your officers to carry out their assigned tasks.
8. Establish a good **working atmosphere** for your officers.
9. **Chair** Board and general local meetings.
10. Make sure the program **stimulates** steady overall **growth**.
11. **Complete unfinished assignments** from previous years.
12. Prepare the **plan of action** for the next year.
13. Check that all activity is consistent with the **JCI Mission**.
14. **Monitor** progress and results, and **redirect** activity if necessary.
15. Be fully **involved** in the day-to-day affairs of the Local Organization.
16. **Comply** with the various requirements set down by your National Organization.
18. Prepare a **report** to the general membership at the end of your term.

RECOMMENDATIONS

1. Familiarization

Read through all previous reports and any relevant information about activities in the previous year. Discuss issues with the past and current officers and, where possible, with **national officers**. Spend some time with the Immediate Past President.

2. Transition

Meet with members of the outgoing Board of Directors for informal discussions about your program. Encourage suggestions.

3. Organization

Carefully examine the structure and see if it fulfills the needs of the Local Organization at the present time.

4. Program



With your Board, develop the program for the year based on the approved plan of action. Review it periodically to ensure projects are being carried out on schedule and to make adjustments as required.

5. Finance

Carefully supervise the finances of the Local Organization. Be sure that proper financial records are kept. Maintain strict control of the budget and cash flow, and review the budget regularly.

6. Meetings

Plan carefully for **every** meeting, whether it is the Board of Directors meeting or a general membership meeting. Have objectives for every meeting, and stimulate participation from the membership.

Do your members look forward to the next meeting? Are they engaged in discussion? If not, think about how to improve the current meeting structure.

7. Membership

Analyze the needs and aspirations of the membership. Are the current projects and activities meeting the needs and wants of the members?

8. Public Relations

Ensure you have a communications plan for interaction with the media, community and other

organizations that promotes the organization's Mission, Vision and Values.

9. Succession

Work with the Board from the beginning of the year to develop plans and likely candidates for future officer positions.

Ensure all likely candidates get a better understanding of the management and dynamics of the Local Organization through involvement and training.

No one knows all the problems you will face as a Local President, but you will meet with a number of them. Lead democratically, with vision, giving adequate thought to the Local Organization's program, guiding and supervising the officers and recognizing them for their achievements, and keeping close contact with the aspirations of the membership.

Just because you became the Local President doesn't mean you possess all knowledge. **Learn while you lead!**

SUMMARY

You are the Local President **for only one year**. If you carefully allocate that short time, build a working team around you, plan and implement a program that will benefit the Local Organization, the membership and the community you can be confident in your completion of a successful year.

JCI LOCAL ACTION GUIDE

Local Immediate Past President

After a year of hard work and dedication to your Local Organization, you have accumulated an incredible amount of knowledge, experience and new skills.

These resources could make you the best person to efficiently run the Local Organization next year, but as the Immediate Past President, you are no longer the Local President. You must allow the opportunity for your successor to acquire the same knowledge, experience and skills you did as Local President.

After acquiring the experience of a year as Local President, seek higher positions in the organization or the community. Continue to use what you've learned as you create positive change in new ways.

For those who, after their year as Local President, are elected to a national position, the year will be equally interesting, full of new experiences, and challenging.

RESPONSIBILITIES

The Immediate Past President should not take an active leadership role in the Local Organization administration. This is now the responsibility of the new Local President.

But all that experience should not be wasted. As Immediate Past President, take on specific duties and do your best to fulfill them.

First of all, use your acquired experience to help the Board of Directors and the membership in general.

Evaluate matters carefully, and exercise a great deal of diplomacy. Assure a smooth and efficient leadership transition, and be friendly, helpful, readily available and in tune with the needs and aspirations of the new administration.

Following are the basic responsibilities of the Local Organization Immediate Past President:

1. Arrange a **special meeting** of the old Board and the new Board. Discuss the transition of administration and be as helpful as possible.
2. Have an **informal meeting** with the new President to discuss the transition and your role as Immediate Past President.
3. Bear in mind that you are a member of the new Board. The local Constitution must state that **you have duties and responsibilities to fulfill**.
4. Attend the meetings and **offer your advice**, and give useful suggestions and ideas when you feel it is appropriate.
5. Sit next to the President at the Board and general meetings, **supporting** him or her at all times. Don't compare the current year with a previous year.
6. Ask the President to give you some **special assignments** to work on. This will offer you the opportunity to share your knowledge and continue to contribute in a significant way.
7. In many Local Organizations, the Immediate Past President is also the **General Legal Counsel** and the parliamentarian at the meetings.

RECOMMENDATIONS

Local Organizations benefit from offering some programs that are of interest to the more experienced members.

A member who has been participating in projects for a long time may no longer be interested in simple, ordinary projects.

Experienced members can conduct more challenging and substantial projects.

The Immediate Past President can be responsible for the coordination and implementation of these projects, assuming he or she has not taken on a national position.



JCI LOCAL ACTION GUIDE: Local Immediate Past President

Following are some suggestions:

1. Revise the local Constitution.
2. Offer your experience as a trainer or guest speaker in orientation sessions for new members.
3. Be available to participate in strategic planning committees.

SUMMARY

There are many other possible projects that might interest the Immediate Past President. Such projects can be of great importance since you know local management and are now one of the "experienced members."

As the Immediate Past President, you have the responsibility to offer your experience to the current Board and be involved in planning the Local Organization's future.



JCI LOCAL ACTION GUIDE

Local Executive Vice President

If a Local Organization becomes too large and the Board of Directors has too many members, a suggested solution to streamline the line of leadership and communications is the creation of the position of Executive Vice President. This position will have the role of supervising the Vice Presidents.

When you are elected a Local Executive Vice President, you are taking up a position with unlimited opportunities for self-development and the opportunity of assuming the highest position in the Local Organization – the Presidency.

This portfolio has a twofold purpose, and is of the utmost importance to both your Local Organization and yourself. You are the right arm of the President, who relies upon your administrative abilities during your year of office.

This is also a year to learn and understudy the role of Local President. Who knows? Next year you might be that President.

RESPONSIBILITIES

The Executive Vice President has two major responsibilities: to supervise the Vice Presidents and to perform administrative tasks the President will not have the time to do.

Here are some of the responsibilities of Executive Vice President. Note from this list the administrative and leadership nature of your office:

1. Obtain your **responsibilities and duties** from the President. Also get to know the names and backgrounds of the Vice Presidents whom you will supervise.
2. Hold a special **meeting with the Vice Presidents** for whom you are responsible, and organize your team for the year. Outline their responsibilities and duties, their system to report to you, dates of further team meetings, and extra objectives and timetables for them.
3. **Help your Vice Presidents** plan their own programs.
4. **Serve as the main link** between the Vice Presidents and the President.
5. **Participate in the selection and training** of the Directors. Be involved in their briefings, supervision and follow-up.
6. **Report regularly** to the President on progress being made in your assigned area of activity, and discuss remedies for problems.
7. **Accept full responsibility** for the successes and failures in your area of responsibility.
8. Together with the other elected officers, you are part of the **Board of Directors**. The Board has a certain set of responsibilities. Discuss the role of the Board of Directors with other officers involved.
9. Be **prepared to deputize** for the President at any time.
10. Learn how to **conduct a successful meeting**.
11. Be **aware of the financial status** of the Local Organization. If you are elected President next year, you will inherit whatever financial situation prevails at the time.

RECOMMENDATIONS

1. Familiarization

Obtain the Handover Files from your predecessor, and read all the material carefully. Remove all matters not relevant to your new portfolio, and make your own file for the coming year.

Discuss your responsibilities with your predecessor (who may be the new Local President) and with other officers and past officers who can advise you on your overall responsibility.

2. Planning

Have a lengthy discussion with the President, who will give you an outline of your area of responsibility. Then meet with the Vice Presidents who are

initially responsible to you. Help them to establish objectives and a timetable to achieve those objectives.

3. Program

Organize your own program, and help your Vice Presidents to establish theirs. Have the programs approved by the President and the Board of Directors.

Make sure that you and the Vice Presidents for whom you are responsible have a personal filing system.

4. Deputizing

Discuss with the President the procedures that will be followed by the Board of Directors when there is a need to deputize for the President at meetings, functions and projects.

5. Supervision

Learn the skill of supervision. As an Executive Vice President, you are the second ranking in the Local Organization. Act accordingly.

Keep a watchful eye on the membership. Next year you may be the President, and you will want to lead a

healthy Local Organization. Check the financial situation constantly because you may inherit the Local Organization's financial status in your presidential year.

Be alert for signs of friction and discontentment among members. If your President is not enjoying a good year, then, for the sake of the Local Organization, for the integrity of your position and for the preservation of a good Local Organization, assist the President in every way possible and help to strengthen the weak areas of his or her administration.

SUMMARY

The portfolio of Executive Vice President is perhaps the most vital on the Board of Directors.

Many Executive Vice Presidents still do not fully understand the importance of this office. It is the dual responsibility of being the right arm of the President, and, at the same time, assuming the role of understudy for the office of the Presidency.

If you are elected as President in the following year, your preparation will make the transfer of command smooth and efficient.

JCI LOCAL ACTION GUIDE

Local Vice President

Being elected Local Vice President is normally the first step in the elected career of a JCI member. The road after is wide and full of opportunities and can lead you to the highest position in the organization: JCI President.

You have been working hard in many other functions in the Local Organization, such as Project Chairperson or Committee Director, and these experiences will guide you to perform your new task as Local Vice President supervising the directors assigned to you.

You are now taking up a position that gives you unlimited opportunities for self-development and the opportunity to run for President for the next year.

RESPONSIBILITIES

Here are some of the responsibilities associated with the office of the Local Vice President.

Note from this list how a Vice President is required to manage and lead:

1. **Meet with the President** and go over the responsibilities, program, objectives, communications and reporting systems, and the timetable for the year.
2. Get familiar with **your responsibilities and duties**.
3. **Meet with the Directors** for whom you are responsible, and organize your team for the year.

Outline their responsibilities and duties, their reporting system to you, dates of further team meetings, objectives and timetables.

4. Help your Directors **plan their programs**.
5. **Serve as the main link** between the Directors and the Board of Directors.
6. **Provide adequate training** for the Directors.

Prepare their briefing sessions, and constantly follow up on their performance and needs.

7. **Report regularly** to the President on the progress of the projects under each of your assigned Directors.
8. Accept the **full responsibility for the successes and failures** in your area of responsibility.

9. Together with the other elected officers you are part of the **Board of Directors**.

The Board has a certain set of responsibilities.

10. **Learn how to run and chair successful meetings**. You will be asked to step in and help Directors and project Chairpeople to run their meetings.

RECOMMENDATIONS

1. **Familiarization**

Acquaint yourself with the recommendations of your predecessor.

Discuss your responsibilities with your predecessor (who may be the new Local President) and with other officers for advice on your overall responsibility.

2. **Planning**

Have a lengthy discussion with your supervisor, who will give you an outline of your area of responsibility.

Meet with the Directors who are initially responsible to you.

Help them to establish objectives and a timetable to achieve those objectives.



3. Program

Organize your own yearly schedule and help your Directors to establish theirs. Have the schedules approved by the President and the Board of Directors.

SUMMARY

As a Vice President, you will be responsible for the constant activity and activation of the Directors and for ensuring that all members are fully involved in the Local Organization's activities.

JCI LOCAL ACTION GUIDE

Local Secretary

The Local Secretary, in addition to possessing some secretarial ability and plenty of enthusiasm and initiative, carries out the major responsibility of the administration of the Local Organization.

Because of the level of responsibility and potential for performance in the position, a year serving as Local Secretary can be one of the most rewarding you will have in JCI.



RESPONSIBILITIES

The Local Secretary is the focal point in the administrative structure. A Local Secretary:

1. Knows his or her primary **responsibility to serve** the Local Organization and the President.
2. Possesses good **writing skills** and is succinct and articulate.
3. Understands the requirements of the **local Constitution**.
4. Has had some basic training in the art of **letter writing**.
5. **Supervises** all secretarial and printing tasks.
6. **Comprehends fully the rules of meeting** procedure.
7. **Keeps the minutes of local meetings**, reproduce them and sends them to the members as soon after a meeting as possible.
8. Establishes and maintains the **filing system** for correspondence, minutes, records and project information.
9. Prepares all **agendas for local meetings** and assists Board members with the preparation of subcommittee agendas.
10. Maintains an **appointment calendar** for the President and Board.
11. Keeps a close **watch on the activities** of the various Committees.
12. **Follows up various meeting decisions** and officer responsibilities.
13. **Arranges for all types of elections** and facilities for balloting.
14. Serves as **the liaison officer** between the Board members.
15. **Sends reminders** to those who have taken on tasks.
16. **Arrives early at all meetings** and functions to make an inspection.
17. **Supervises the historical records** of the Local Organization and updates them.
18. **Maintains a decisions book** and records the major decisions made at meetings and functions. Checks on progress made.
19. **Attends as many different local meetings** as possible to stay well informed about the activities so that he or she is able to keep the President informed about important issues.

RECOMMENDATIONS

Here are some suggestions for the five major areas of responsibility for the Secretary:

1. Service to the President.

Work closely with the President, and keep him or her advised on all trends (e.g., membership, attendance, project participation, etc.). Maintain an advisory status between project Chairs and the President. Prepare the

agendas and discuss them with the President, and be an efficient, competent and enthusiastic assistant to the Local President.

2. Service to the Board of Directors.

Work closely with the Local Treasurer regarding correspondence, banking, receipts and miscellaneous activity. Provide secretarial assistance to all members of the Board, particularly the Vice Presidents. Help the Public Relations Director with communications efforts. Keep the Board files up to date, and provide timely reminders to Board members at when appropriate.

3. Service to the Membership.

Always be available to answer questions from the membership; schedule all meetings and supervise all arrangements; send reminders to members; prepare a public display of the agendas (e-mail, website, etc.); make the minutes available to the membership (website, e-mail, etc.); make public the calendar of events; and keep all records accurate.

4. Communication, Correspondence.

Correspondence is the chief public relations tool, so be prompt and conscientious about correspondence; ensure that official correspondence goes out on the Local Organization letterhead; follow up on various tasks; send timely reminders to people; maintain an effective contact with other Local Organizations, the National Organization headquarters, national officers, and JCI; and check that a membership

directory is regularly updated.

5. Maintenance of Records.

Maintain all historical files, and update them as necessary. Supervise the maintenance of all membership records, and maintain the project records file and update as needed. Prepare record-keeping guidelines for project Chairpeople. Keep all membership supplies, merchandise, office supplies, banners, gavel, creed, trophies, and set up any other records that will help to preserve a thriving and well-managed Local Organization.

A Word of Advice.

The list of activities may seem long and covering a wide area of responsibility. The Secretary is not responsible personally for carrying out all these tasks, but is to keep a careful watch over their progress. The Board will decide which officer or member must take actual responsibility for the task, and the Secretary is to make sure to keep a friendly eye on the person assigned the duty.

SUMMARY

The Local Secretary has to be the most versatile member of the Board of Directors. The Local Organization will rise and fall on the ability of the Secretary to guide the management process, and thereby lay the efficient groundwork upon which a lively and successful program can be based.

JCI LOCAL ACTION GUIDE

Local Treasurer

Although the achievements of a Local Organization cannot be measured in currency, little can be accomplished without adequate finance. This will not be available without disciplined financial management.

No program that involves finances can be successful without the leadership of a competent Treasurer.

It is an honor to be chosen for this office, and the member elected should remember that the prosperity of the Local Organization will largely depend upon his or her dedication and guidance.

RESPONSIBILITIES

1. Make budget information readily available to the Board and members.
2. Ensure that the previous year's accounts have been audited by a qualified accountant who has no connections with the Local Organization.
3. Discuss the position with your predecessor.
4. Make sure that each Board member submits a budget to the Board at the beginning of the year.
5. Prepare a draft budget at the beginning of the year. Submit it to the Board and then the general meeting for adoption.
6. When making a budget plan, estimate your income as low as possible and your expenditure as high as possible.
7. Investigate promptly the state of the Local Organization's reserve fund and any investments. Look for ways to increase their effectiveness.
8. Apply high professional ethics and shrewd planning skills.
9. Establish Local Organization finance policies (e.g., administration costs to be covered by dues, projects to be self supporting, etc.).
10. Maintain strict control over the budget and cash flow.
11. Maintain a receipts journal, which is a record of money received.
12. Maintain a payments journal, which is a record of checks issued and payments made.
13. Take a basic course in bookkeeping if you are not an accountant.
14. Prepare monthly statements, and do a budget comparison every three months. Make the details public, and use part of the meeting to discuss trends, current situation and budget alterations needed.
15. Produce appropriate finance forms (e.g., purchase order form, project budget plan, officer allowance form, etc.)
16. Relate all activity and program discussions to budget allocations in order to prevent overspending by enthusiastic members.
17. Always budget for a surplus.

RECOMMENDATIONS

1. Each Board member must produce a budget. Add their recommendations to your own anticipated list of requirements to produce a budget proposal. Add to these items an additional sum to allow for emergencies and for the introduction of new programs later in the year.

Finally, add a little extra as a reserve. The resulting budget divisions represent submissions from the Board members and from the Treasurer, an extra sum for new programs, and a special reserve figure for emergencies.

2. List all the avenues of income: Dues, advertising, sponsorships, grants, fundraising projects, etc.



3. List your expenditure and income items. When preparing your budget sheet, you can place the income column on the left, the right, underneath the expenditure column or above it.

There are no specific rules for placement. Once the columns are there, you can make the appropriate comparisons.

4. At least every three months, prepare a summary of the income and expenditure to date. This should be circulated to the Board and then at a general meeting.

For your own purposes, keep a cash flow chart and produce a copy of each month for the Board only.

As a further guide, prepare a budget comparison at the half-year mark.

Discuss in some depth the state of finance in the Local Organization at the Board meeting and then at the general meeting.

SAMPLE OF A LOCAL BUDGET

Revenue (*Income*)

Dues revenue (*funds strictly from members*)

- Membership dues (*dues paid by members*)
- Non-dues revenue (*sources not from dues*)
- Advertising (*funds from advertisement in your newsletters, website or other media*)
- Conventions and Meetings (*funds collected from delegates' registrations*)
- Donations (*funds donated by patrons*)

- Grants (*grants from other organizations*)
- Interest (*interest accrued*)
- Product sales (*funds from product sales*)
- Sponsorship (*funds from project sponsors*)

Expenditure (*Expenses*)

- Advertising (*marketing and recruitment*)
- Authorized Travel (*funds for Board travel*)
- Communications/ Publications (*funds for communications media and publishing*)
- Conventions and Meetings (*funds and deposits paid for hosting conventions and meetings*)
- Insurance (*insurance for equipment, etc.*)
- Officers visits (*official officers and visitors*)
- Office Supplies (*office supplies*)
- Programs (*funds allocated to programs*)
- Products (*funds for products, if any*)
- Public Relations (*funds for PR efforts*)
- Rent (*secretariat building rent, if any*)
- Staff Salary (*payroll for staff, if any*)
- Taxes (*applicable taxes, if any*)
- Telephone/Fax/Internet (*self explanatory*)

SUMMARY

A budget is not a straitjacket. If it does not seem suitable, change it. Collect monies, pay all accounts by check and have the president countersign them; and pay all debts promptly.

In your year, the opportunities are endless – especially for your personal budgeting skills.

JCI LOCAL ACTION GUIDE

Local Director

This office is the first major step on the Local organization's leadership ladder. It is a time for learning to lead. From here you can prepare for higher JCI offices in the coming years. A local Director may be for project or for a specific task. You may occupy this office for a full year or just for specified period of time depending on the duration of the project or task.

You must build a solid leadership and organizational foundation at this time. Be thorough in your planning and conscientious in your efforts. As a leader of a team, you will help to shape the future of the Local organization, your community and, your own future, too.

RESPONSIBILITIES

Here are the main responsibilities of a Local Organization Director:

1. Clarify your appointment and get a detailed job description from the local Vice President.
2. Meet with your Vice President and discuss the objectives set down for your area of responsibility.
3. Meet with your predecessor, and discuss with him/her the responsibilities of this office. Ask for the handover files.
4. After meeting all appropriate people, establish your own objectives, together with a timetable for their implementation. Keep your objectives within the Local Organization program framework.
5. Learn your duties and fully understand your responsibilities. At this stage of your leadership activity, it is a good idea to become conversant with your local Constitution and Bylaws, meeting procedures, reporting techniques, and have developed skills for public speaking, effective writing, and good communication.
7. As a team leader, you will be observed by your fellow members. Set a good example.
8. You must be an effective communication link between the Board and the membership.
9. Understand the chain of command and your place in it. Be sure that you understand the reporting system. If you must have permission to do certain things, know how you must go about seeking that permission.
10. Above all, be enthusiastic, positive, well organized and loyal.

RECOMMENDATIONS

Below are some questions you may have and the answers you are probably looking for right now. You are starting your climb to the top. The climb should not be a selfish one for personal gain alone.

It should involve a genuine desire to serve your fellow members and to contribute to the well-being of your community.

1. Why become a local Director?

Because it is an interesting challenge, it is the natural result of leadership training, it is a springboard for higher offices, it should help the individual in personal life, it is the first step in getting involved with your community, every chapter needs good leaders, and leadership is what JCI is all about!

2. When are you ready to become a local Director?

When you have been a member of a few projects, after you have had some discussions with past and present Board members about the responsibilities of a Director, when you have read through the Constitution and Bylaws, when you understand the rules of meeting procedure, and when you have enough confidence to be able to lead your fellow members. Take your position serious get ready and then go for it.

3. How can you be the best at what you do?

Keep up to date with all relevant information; attend Board meetings regularly; have discussions with your Vice President or any other officer; take part in courses that will help you to improve your work; be confident in your own ability; keep good records; be organized at all times; and set goals and plan carefully.

4. What do you concentrate upon in this position?

You concentrate on learning about your responsibilities, on improving your organizational skills and time management, on decisions of the Board, on the needs of the members, on your goal, on your planning and on making the Local Organization leadership more effective.

SUMMARY

You are part of a team and responsible for the affairs of many individuals. This is quite a responsibility; don't treat it lightly. Plan to attend board meetings, General Meeting, National Conventions, an Area Conference and World Congress, these are great opportunities to share experiences and learn from others. A strong local leader will ensure a good year for the Local Organization. Make this your goal.

JCI LOCAL ACTION GUIDE

Local Administrative Structure

The organizational structure of a Local Organization must be suited to meet its own needs. But every Local Organization needs the following components:

1. **General Assembly.** It is through this body that the control of the Local Organization is exercised.
2. **Board of Directors.** The function of the Board of Directors is to provide direction to the Local Organization and facilitate its administration.
3. **Project or Program Committees.** The Project or Program Committees are the means through which the work of the Local Organization is carried out. Each member should be assigned to at least one committee.



STRUCTURE

There is no ideal organizational structure that fits the needs of every JCI Local Organization, but there is one that is right for yours. Here are a few guidelines that will assist in designing your Local Organization's structure:

1. No one person should be required to supervise more than five people.

In JCI, officers are volunteers and have a life and profession besides JCI. Don't overload them with too many people to supervise. Three to five people should be the maximum one person should have to supervise.

2. Balance the workload among the Board members.

Each member of the Board should have a fair share of the work and nobody should be overloaded with work while others may have little or nothing to do. This will only generate stress that may lead to animosity among the Board members.

3. Allow for a flexible organizational structure.

If the number of members increases or reduces dramatically during the year, the structure must be flexible to adapt to the new reality. If Board members resign or move out of town and the Local Organization experiences a reduction of members, there may not be a need to replace the missing Board members. Accommodate by temporarily shifting the responsibilities to another member of the Board.

4. Provide for easy and rapid two-way communication.

As the number of middle-management levels increases, the difficulties of communication multiply. Develop an easy-to-understand and efficient communication and reporting system to avoid difficulties in getting information down to the members or reports and suggestions up to the leadership.

5. Allow for delegation of responsibility and authority.

Everything must be clear regarding who reports to whom and who makes decisions and to what extent.

6. All supervisors must know what is expected of them, the importance of their roles in achieving overall objectives, and the standards by which their performances will be judged.

Make job descriptions and delegated responsibilities clear and well known to everyone. The Board of Directors must establish the minimum standards that will define if a job is satisfactorily completed or not.

CHANGING TRENDS

In today's fast-paced and constantly changing world, young people are starting to rewrite the formula for a successful organization. Most of the younger members of our Local Organizations are technologically savvy, they are extremely resourceful and most importantly, they are impatient.

They want immediate opportunities to become involved, but they may not stay long in the organization. The new philosophy for young professionals seems to go like this:

JCI LOCAL ACTION GUIDE: Local Administrative Structure

1. They join a company or organization and learn as much as they can;
2. They become immediately involved and look for an opportunity to move on to new challenges;
3. They are extremely team-oriented and do not necessarily expect to lead the team.
4. They always keep eyes open for other opportunities in a different organization;
5. When they do aspire to attain leadership positions, it is usually within a short period of membership.

Sometimes, this process can take as little as one year and sometimes, it lasts for several years. However, research indicates that it is rare to find young professionals staying with the same company or organization for long periods of time.

This dramatically affects JCI Local Organizations, and alternative ideas need to be discussed for potential Local Organization structure in the future.

The local membership is always moving and changing. Local Organizations must adapt to the changing trends and new realities.

RECOMMENDATIONS

Depending on the size of the small- or medium-sized Local Organizations, consider keeping the size of the board relatively small. For example, a small- or medium-sized Local Organization should limit Board positions to President, two Vice Presidents, Secretary and Treasurer. One way to keep younger members active and involved is to emphasize the use of Project Directors for nearly every task.

Use Project Directors for everything from community projects to membership recruitment or public relations.

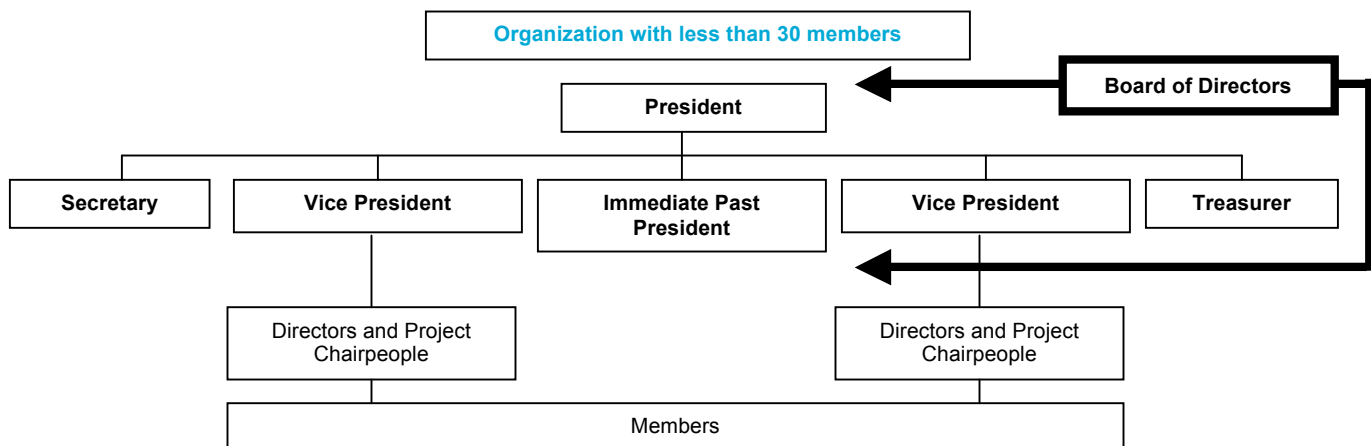
Members can be involved by being the newsletter Project Director for three months, training someone else to take over that task, then moving on to be the Project Director for a Business Networking Event. By using a small Board, the Local Organization encourages its Board members to constantly find and mentor new Project Directors who will learn by doing.

Advantages:

1. Members can get involved immediately;
2. If a Project Director does not perform the duties accordingly, it does less damage to the organization than if an elected Board member fails;
3. Project Directors can learn to organize several different types of projects, events and administrative tasks before being on the Board;
4. Young members can rise quickly through the organization if they are talented.

SUMMARY

The following example of organizational structure may be helpful to you as you examine your present structure. Remember, it is just an example. Use the parts you feel are applicable to your Local Organization.



JCI LOCAL ACTION GUIDE

Local Constitution and Policy

The Local Constitution is the most fundamental document of the organization. The contents of any Constitution should be stated clearly and simply. No Constitution can be effective if it attempts to legislate for details. These are more suitably dealt with through policies, which are the everyday working rules.

The test of a Constitution's worth is its effectiveness in giving prospective members a proper understanding of the nature, aims and purposes of the organization.

OBJECTIVES

A Constitution includes:

1. The name of the organization. It must state the official (legal) name and any variation the organization will also be known by.
2. The mission, purposes and principles. It must state why the organization exists and what kind of principles will guide the activities, administration and general decision making.
3. Who is eligible for membership. Clearly explain the rules of who can be a member and how the process works.
4. How the organization should be governed and how officers are elected:
 - i. What will be the supreme authority? How will it be composed? When will it meet?
 - ii. What officers will it have? Who will elect or appoint them? How will they be elected or appointed?
 - iii. How will the policies be implemented? Who will be responsible for seeing that this work is fulfilled?
5. The finances of the organization. It must state who pays dues and who decides on the amount each member pays. It also must state the responsibilities of the officers who will handle money and who can sign financial documents on behalf of the organization.
6. The method used to amend the Constitution. The Constitution can be amended only if the proposals are circulated in advance to all voting members. It must require a two-thirds majority to be changed. It can also state a minimum quorum needed for any amendment to be voted to avoid a small number of members changing the rights of a large majority.
7. The Local Organization Constitution must not be in conflict with that of the National Organization and JCI. The Local Organization must ensure that the Constitution reflects the rules of the National Organization and JCI.

The Constitution may include:

1. **Articles:** The articles of a Constitution are separately marked sections or clauses that *specify* the purpose or other terms and conditions of the Association. The articles are the rules and regulations by which the Association will work.
2. **Bylaws:** The purpose of the bylaws is to help *define* the rules and regulations. As such, they are subsidiary to the articles of the Constitution and must be drafted in a manner that, in the opinion of the organization, seems best suited to meet its requirements.

POLICY MANUAL

A Local Organization can also adopt a Policy Manual to give details of the day-to-day work, such as:

- How meetings will be run:

Include when meetings will be held, who will be the chairperson and by what rules meetings will be conducted.
- How reports should be presented:



JCI LOCAL ACTION GUIDE: Local Constitution and Policy

Include who will be responsible for presenting reports and what will be done with the report.

- How activities should be carried out:

It must be clear who will be responsible for activities and how they will be conducted and financed.

- How the performance of officers should be evaluated:

The Policy Manual defines the minimum standards

of performance for officers and what happens if they are not achieved.

- Any other rule that cannot be considered an article or bylaw of the Constitution.

A Policy Manual in most cases does not need the vote of General Assembly to be amended.

SUMMARY

The Local Board of Directors decides on policy changes by a two-thirds majority. Your constitution will dictate what is applicable in each case.



JCI LOCAL ACTION GUIDE

Local Strategic Planning

Every Local Organization must have a plan that goes beyond its yearly activities. The strategic plan guides the future of the Local Organization. It identifies strategic goals and ways by which those goals can be accomplished over a period of time.

While leadership changes every year, it is important that the Local Organization maintains a strategic focus that positions it in the community and continues to attract young people.

A strategic plan is recommended for every three to five years.

Appoint a Strategic Planning Committee to discuss the Local Organization's future and present their recommendations for the long-range plans to the Board of Directors and ultimately to the General Assembly.



COMPONENTS

Strategic planning will affect all aspects of the Local Organization's life, including programs and services, recruitment, sponsors, communications, finances, public relations, etc.

The process of strategic planning therefore will affect and be affected by all constituent groups of members who have an interest in the organization's success.

The members of the Strategic Planning Committee must have a clear understanding of what strategic planning is and how the process can benefit the organization.

Properly conducted, strategic planning is simple, effective and should answer questions such as:

1. What is the **purpose** or **mission** of the Local Organization?

Why does the Local Organization exist?
2. What **vision** does the Local Organization have of what it might become in the future?
3. What **opportunities** does the Local Organization provide, and what opportunities *should* it provide in the future?
4. What are the expectations of the current membership as opposed to those of the future membership?

How might the Local Organization respond to these changes?
5. Given the surrounding environmental conditions and the current capability of the Local Organization, where should it **concentrate efforts** and **resources** to carry out its mission and reach its vision?
6. What **performance measures** will be used to track **implementation** of these priorities?
7. How will progress be monitored so as to **revise** the **organization's priorities** as conditions change?

STRATEGIC PLANNING STEPS

1. Plan to succeed

The Local Organization must decide who will be involved in the process and clearly determine what the result of the exercise should be, as well as how the process will be carried out.

2. Gather information for a self-study or organizational analysis.

Make a full and accurate list of every facet of the Local Organization:

- a. Meetings
- b. Assets
- c. Awards
- d. Constitution
- e. Organizational structure
- f. Dues
- g. Finances

- h. Recruitment procedures
- i. Induction ceremonies
- j. Communications
- k. Elections
- l. Community projects
- m. Training programs
- n. Publications
- o. JCI Senators
- p. Social functions
- q. Public relations
- r. National commitments
- s. International involvement
- t. Overall objectives, etc.

3. Identify key issues for the future of the organization.

As a committee, analyze the data to see what light it sheds on the long-term future of the Local Organization. Make a short but comprehensive list of six to eight key issues to be addressed by the Strategic Planning Committee.

4. Choose strategic priorities to guide the Local Organization for the next several years.

The strategic priorities should affect the Local Organization as a whole and address the relationship between the Local Organization and its members. No step is more important than the decision to concentrate limited resources and time on the achievement of a few vitally important goals.

5. Develop initiatives or plans of action for each of the strategic priorities.

Brainstorm ways the Local Organization can improve its performance in each area.

6. Select and monitor performance measures to

track progress in implementing each of the strategic priorities.

The services offered are often qualitative in nature and therefore difficult to measure. For this reason it is good practice to use performance measures to track progress on each priority.

7. Review progress toward accomplishing the Local Organization's strategic priorities, and revise the plan at least once a year.

This step should also be done any time that outstanding problems or opportunities present themselves.

Changes in the internal and external environments often require new and different responses from the organization.

SUMMARY

When properly conducted, strategic planning can be among the most satisfying and rewarding aspects of a Local Organization's life. The process embraces a wide range of visions, ideas, people, feelings, specific data, hard realities and grand dreams. The technique of strategic planning builds the Local Organization's knowledge of the organization and its environment.

This knowledge, in turn, enables the Local Organization's Board to make informed decisions on the important policy issues of institutional mission, long-term priorities, and organizational goals and objectives.

JCI LOCAL ACTION GUIDE

Local Plan of Action

Strong planning is a prerequisite to accomplishing goals. A plan of action outlines *now* what to do in the *future* to effectively fulfill the mission and objectives of the project or activity.



PLANNING PROCESS

A plan of action lays out clearly the goals that a Local Organization sets out to accomplish in a given year. A plan of action must fit in with the Strategic Plan of the organization. A plan of action must answer the following questions:

1. Why does the organization exist? – The mission or purpose.

The mission of an organization is the reason for its existence, the definition of its purpose. Each Local Organization is unique and will have its own mission, but it must be closely related to the mission of JCI:

"To provide development opportunities that empower young people to create positive change."

2. Where will the organization concentrate its efforts? – The Key Result Areas.

The mission should now be divided into Key Result Areas, which will determine where the organization and the officers should invest most of the time, talents, energy, and money.

The Key Result Areas are the areas where the organization needs to focus its primary attention and where **results**, not activities, **are significant**.

3. What do we want to do? – The Objectives.

Objectives form the basis for determining what activities to perform. Objectives also help to establish criteria for evaluating how well the activities are being conducted.

An objective is a statement of a result to be achieved and must start with the word "to," followed by an action verb. It must be **clear**, **achievable** and **measurable**.

4. Who will be responsible for it? – The Officer Responsible.

Each objective must clearly indicate who will be responsible for the coordination of the action and the accomplishment, as well as the development of strategies and the assignment of new responsibilities to each strategy.

5. When should it start and be completed? – The Deadlines.

Include dates to begin and end or a time period within which the result is to be accomplished.

6. How much is it going to cost? – The Budget.

The objective must stipulate the maximum investment the Local organization is willing to authorize.

7. How will each objective be done? – The Action Steps.

The objective is now divided into smaller steps, general actions to accomplish the objective. The action steps must also indicate the person responsible, the deadline and the cost.

After the above process is completed, the actions should be spread over the yearly calendar.

THE PLANNING SCHEDULE

The following steps should be taken during the development of the Local Organization's plan of action:

1. Draft the plan of action.

The President and the Secretary have the responsibility to prepare a draft of the plan of action for the next year. It is important to note that it is the outgoing Board that develops the plan of action for the succeeding year.

2. The Board of Directors amends the draft.

The draft is discussed by the Board of Directors and amended if necessary.

3. Final Proposal goes to General Assembly.

The proposal is submitted to the general membership and amended if necessary at the annual General Assembly.

4. Incoming Board incorporates the changes approved by General Assembly.

The final Plan of action is now printed and distributed to all Local Organization members.

5. Board members prepare individual plans.

Each officer of the incoming Board prepares individual plans of Action after receiving their assignments and responsibilities for various objectives.

6. Approve individual plans.

The Board of Directors approves each officer's plan of action during the first month in office.

7. Design yearly schedule of events.

The Secretary can now spread the activities over a yearly calendar and send it to all members with the deadlines and assignments.

8. Supervisors follow up with team.

Now is the time for action, and the immediate supervisors of each officer should follow up with their team members to ensure everything is going according to plan and schedule.

9. Evaluate and make recommendations for the future.

The President and supervisors should evaluate the progress every month and make recommendations on actions or objectives to be included in the next year's plan of action.

10. Draft next year's plan of action.

Go back to the first step. By properly using the evaluation and recommendations, it is easy to draft next year's plan of action.

SUMMARY

A clear and achievable plan of action is both a guide to direct the efforts of officers and members but is also a tool that helps communicate the directions and purposes the group is aiming for.

A plan of action is not cast in stone once it is printed. Review your plans monthly and update them quarterly, or whenever circumstances in the Local Organization change significantly.

JCI LOCAL ACTION GUIDE

Budget and Sponsorship

In preparing a budget:

1. List all administrative (not project) expenses, including advertising for marketing, travel, communications, utilities, supplies, rent, taxes, etc.
2. List all secured sources of income, including advertising on Local Organization website, secured donations and grants, interest, product sales, etc.
3. List the projected number of paying members to give you an estimate of income from membership dues. Do not estimate for members who are not members yet. A safe calculation is the average of members in the last few years.



RECOMMENDATIONS

The difference between income and expenditure must be covered by membership dues. You will not find sponsorship for administrative expenses. They must be covered by membership dues. If the expenses are higher than income, one option is dues increase and the other is reducing expenses. Another option to consider is increasing your membership. You cannot have a budget with more expenses than income.

Projects and programs can have sponsorship. Projects can attract sponsorship if sponsors see value in your projects, and not necessarily because they attract the media and large public attention. When seeking potential partners, look for organizations that you can offer value to, who have similar goals and objectives.

BUDGET IMPLEMENTATION STEPS

The following are the basic steps to implement strong monetary control in the Local Organization:

1. Preparation of the budget:

- a. The Board members (and finance commission, if it exists) indicate the requirements, according to the proposed plan of action
- b. The Treasurer estimates the administrative expenses.
- c. The Treasurer conservatively estimates income.
- d. A balanced budget is the final result.

2. Approval of the budget:

- a. The final draft is presented to the Board of Directors for consideration.
- b. The Board amends and approves the budget proposal.
- c. The final proposal is presented at the General Membership meeting for consideration.
- d. The Local Organization's budget is amended and approved by the Local Organization General Assembly.

3. Review of the budget:

- a. The Treasurer reviews the budget weekly and prepares a monthly report to the Board, including the current status and the projections of income and expenditures for the next months.
- b. The Board reviews the budget and future projections once a month.
- c. The Board makes the necessary amendments and corrections to the budget.

4. Financial records:

- a. The Treasurer keeps a book to register income and another book for expenditures.
- b. All payments should be made by check, signed by the Treasurer and the President.
- c. The Treasurer prepares a monthly report on cash balance, payments during the last month, and projected payments for next month.

DONATIONS AND SPONSORSHIP

There are two ways a Local Organization can secure extra income: sponsorship and donations.

Because not all projects have a sponsorship appeal, and no organization will

sponsor administrative expenses, Local Organizations can seek donations that can help cover administrative costs and projects that lack sponsorship appeal.

Types of donors

Here are some suggestions for different types of donors:

1. **Past members:** A person who credits much of his or her success to past participation in JCI.
2. **Value to the community:** A past member or others who see the value JCI provides for the community and young people.
3. **Partners:** Suppliers or other organizations you work with who have witnessed the value of JCI.

Types of sponsorships:

1. Financial investment and value

A company wants to be associated with the project and get more business from the sponsorship. The project must have public appeal, either by attracting a large crowd to a location where the sponsor's ads or products can be seen or by getting large media attention, where the sponsor's ads and products can be seen with the subjects of the media attention.

2. Exchange for benefits

When a Local Organization is developing a project, there are other resources needed in addition to money. If the project manager of a Local Organization is creative and resourceful, many of the items needed to successfully run the project can be donated by outside companies despite a lack of monetary donations by the company.

Rather than trying to raise money for the event over and above the registration cost, the project manager may decide to approach a hotel for a donation of the room or a special rate on room rental.

In exchange, the hotel would receive three spots in the JCI Training course for three of its managers or other employees, plus an advertisement in your newsletter and/or your website. In this way, you can barter with the hotel rather than asking for a monetary donation.

This approach can be especially effective to create long-term partnerships with a company. In the example above, it is possible that one of the hotel managers ultimately will join your Local Organization.

3. Small shared sponsorship for a specific purpose

Sometimes, it is better to ask for sponsorship donations in small amounts that are tied to a specific purpose so that people can see the immediate benefit of their donation.

Of course, this could be done with any donation level. You could break it down into donations of \$50 or \$75 for a specific reason, rather than asking for \$2,500 to sponsor an entire project.

The project manager can seek donations from large companies, small businesses, entrepreneurs, friends, acquaintances and co-workers. The budget for a project does not have to be sponsored by one or two main sponsors. You can be just as effective with many smaller sponsorship donations.

SUMMARY

All projects should have a basic budget. At agreed times, compare the budget figures with actual figures and inform the members of the financial commitment for that project.

Give monthly reports at general membership meetings of the financial status including budget figures compared with actual figures.

JCI LOCAL ACTION GUIDE

Local Protocol

One of the most important highlights of a JCI year is the visit of an international officer to your Local or National organization. As you gear up to host international officers this year, we would like to share some ideas about protocol with you.

Protocol is particularly important during official ceremonies and functions such as local and national meetings, receptions, hosting a JCI officer, JCI Conferences, World Congresses, etc.

International protocol helps us deal with cultural differences in a formal manner. Just as each country may have its own protocol, so does each organization or company.

PHILOSOPHY

JCI, like most organizations, has a set of rules, etiquette or norms that are used in ceremonies or events. But local norms are also considered, and they vary from one area to another.

The term “protocol” has many meanings and connotations. For our purpose, we’ll say that protocol is “the generally-accepted code of etiquette and precedence within a particular group or entity.” In other words, it’s an ***expected and acceptable way of behaving in a given social situation.***

BASIC RULES

A general rule of protocol is that the guest follows the rules of the house.

Inform your guest about the appropriate dress code for the function, the suggested time of arrival, the point of entrance, where to park, who will greet the guest and where, persons to be introduced to the guest at the point of entrance, order of procession to the hall, seating arrangements, order of speeches, and order of departure after the event.

In general, elected JCI officers rank higher than appointed officers. For example, an elected Executive Vice President ranks higher than an appointed Secretary General, Treasurer or General Legal Counsel.

During official ceremonies, lower-ranking officers speak and are introduced before higher-ranking officers. If too many lower-ranking officers are present for all to be introduced, just mentioning their names will be enough to recognize their presence.

PROTOCOL FOR SPEAKING

Ensure that pronunciations and punctuation are correct. In general, lower-ranking officers speak before higher-ranking officers, for instance:

1. Local President
2. National Board Member
3. National President
4. JCI Vice Presidents
5. JCI Executive Committee Members
6. Government officials
7. JCI President
8. Country’s president or head of state

Remember:

- To check the visiting officers’ titles, names of countries, etc., to make sure they are announced correctly.
- To display national and organizational flags properly.
- To recite the JCI Creed at the start of any official function or meeting.
- To play the national anthem if necessary.



PROTOCOL OF SEATING

Seating arrangements are typically designed not just to honor an important guest or friend but also to enhance the flow of good conversation during dinner.

At an informal dinner, a toast or grace may not be expected. In a formal dinner or ceremony, a grace, invocation or toast may be given to honor or celebrate a particular person or a significant event or date of the organization.

It is customary to allow the main guest or VIP to make brief remarks or deliver a “message of greetings” just before dinner or immediately after.

The host should have the last intervention with a “vote of thanks.”

Gifts or presents may be exchanged before or after dinner.

In most organizations, guests are seated according to rank or seniority.

Emphasis should be to ensure that guests are placed in their proper seats.

Proper salutations and recognition of important dignitaries in the room is also the norm.

For seating arrangements, please note the following:

- Important dignitaries, VIPs or high-ranking officers should be seated in the front row and low-ranking officers in the rows behind.
- To avoid any confusion, seats can be reassigned with name cards placed on each seat or on back of the seat.
- Foreign guests rank higher in order of seating than local guests.
- Both husbands and wives are granted the same status as their higher-ranking spouses. Thus, if the host National or Local President is a married woman, her husband is seated according to her rank.

SUMMARY

Above all, recognize that people are different, and spend a little time building relationships and learning how people from other cultures think and behave. The world can then open up to you.

As stated in our JCI Declaration of Principles, “...*the brotherhood of man transcends the sovereignty of nations...*”

JCI LOCAL ACTION GUIDE

Marketing Plan

A marketing plan is a written document outlining the actions needed to achieve your marketing goals. A marketing plan organizes your marketing efforts clearly and in great detail.

When creating a marketing plan, begin by choosing the place, time and people involved. Because marketing involves nearly every aspect of the organization, the local board of directors should participate.

A Marketing Plan begins with analyzing your current situation, both internally and externally. First research what the community needs, possible competitors, and the market demographics. Then, define the objectives and goals of your organization, which should always start with the JCI Mission and Vision.

SITUATIONAL ANALYSIS

Your situational analysis, also known as external research, is the main aspect of the marketing plan. It is composed of three main areas: market summary, SWOT analysis and competition.

All JCI organizations exist within a community. By examining your external environment in your situational environment, you will be better equipped to address your community's needs in your marketing plan..

Market Summary

The market summary includes market needs and market demographics. Research for market needs include the major problems of your community that need to be addressed. Which of those problems are members most connected to? What kind of projects would gain public notice?

Market demographics take into consideration the potential target market (members, sponsors and partners) in the community.

SWOT Analysis

The SWOT analysis is both an internal and external market analysis. First, examine the internal strengths and weaknesses of the Local Organization. An internal strength could be strong organizational skills and a weakness could be a lack of physical resources (i.e. office space, computers, etc.).

Then, begin examining the external opportunities and threats. An opportunity could a large demographic of young active citizens in the community. A external threat could be a lack of potential sponsors and partners to donate more to the organization or projects due to an economic downturn.

Competition

Be aware of other community-based organizations that might attract potential members other than JCI, as well as other JCI Local Organizations. If your Local Organization is in a large city amongst other JCI Local Organizations, make sure the lines of communication are kept open so that the different Local Organizations do not focus on the same problems or try to attract the same members and sponsors as one another.

In dealing with other organizations outside JCI, focus on the key selling points of JCI that make JCI unique. Some unique selling points to remember are JCI's global network, our young active citizens and creating sustainable change.

MARKETING STRATEGY

Marketing strategy encompasses the larger goals and objectives of the organization and then outlines how to obtain those goals and objectives. It begins with the JCI Mission: to provide development opportunities that empower young people to create a positive change. The Mission sets the purpose and the overall direction of the organization. After defining goals, the outline the target market by the different groups affected by JCI. The last aspect of the marketing strategy is the marketing mix.

Goals and Objectives

The objectives and goals of the organization are to further the key ideas stated in the Mission. Other key goals important to every organization include

JCI LOCAL ACTION GUIDE: Marketing Plan

attracting new members, keeping current members, establishing a positive profile in the community, attracting sponsors and partners, obtaining support and recognition for positive actions and projects in the community and staying connected to other JCI Local and National Organizations and JCI World Headquarters.

Target Market

Your target market defines who your efforts are directed towards and who is affected by your efforts. For your organization this includes: potential members, potential partners/sponsors, current members, current partners and sponsors, the community and JCI alumni. Consider the needs of each group, then explain how your Local Organization can fulfill those needs.

Marketing Mix

The marketing mix is the tactics used to obtain the marketing objectives. The marketing mix is composed

of four areas, known as the 4 Ps: product, place, price and promotion.

- The JCI **product** includes three major parts: Mission, Vision and Values, the JCI experience, and tangible offerings like projects, training and events.
- The **place** is defined by the locations of meetings, events and projects.
- The **price** is an area that each Local Organization must determine individually. A few things to consider are the budget of the organization and what the Local Organization pays to the National Organization per member.
- **Promotion** is how you get the word out about your organization. It's is much more than just advertising, but also public relations efforts and any way you increase awareness. Promotion is present through everything the organization does, from wearing JCI t-shirts, to how your members present themselves in public.



JCI LOCAL ACTION GUIDE

Internal Communications

JCI would not exist without the 200,000 dedicated young active citizens who are members around the world. Internal communications focuses on communicating both with current and former members. After laying out a communications plan, this section details the tactics to approach internal communications.



PLANNING

Before beginning your internal communications efforts, take the time to consider some important factors that will influence your decisions.

1. Target audience

Consider who you are targeting with your efforts. In internal communications, this includes members and former members (alumni, Senators, etc). Examine the needs of the different groups and subgroups within your target audience. Knowing your members will help you communicate with them. Because of their positive JCI experience, many people wish to remain involved even after they turn 40. These former members are excellent resources for knowledge, history and development opportunities.

2. Goals

Determine the goals of your project. Include broader goals – furthering the JCI Mission, presenting a clear and consistent JCI image in the community – and more specific goals – keeping members up-to-date on JCI activities or increasing attendance at JCI events.

Internal communications goals can include:

1. To further the JCI Mission, Vision and Values
2. To keep members up to date on JCI activities at the local, national and international levels
3. To inspire members and keep them motivated to be involved
4. To present a clear and consistent image of JCI, internationally, nationally and locally in order to reinforce this image and build the brand

Other goals may be added for each individual project, such as raising attendance at an event or increasing participation in a program. Though some goals – such as furthering the JCI Mission – are abstract, it's important to have measurable goals as well. This helps you to measure your progress after the project is complete. Setting the goal of “increasing the number of new members who go to a meeting” is less effective than “increasing the number of new members at a meeting by 15%.”

3. Plan of Action

Draft a plan of action to help make decision about your message and how it will be delivered. As you think through the best course of action, consider the right time and right place to reach your target audience. This will help you decide which tactic to use for each goal.

EXECUTION

You will accomplish your strategy and plan of action with communications tactics. The strategy for choosing and executing tactics will be rooted in your communications plan: your goals, target audiences and understanding of the external environment.

For each project, determine your goals, and plan with the target audience in mind. This will guide tactical decisions, from choosing whether to send a newsletter or press release, all the way down to the writing style you use. There are several ways you can communicate with members and former members.

1. Print Newsletter

Use a print newsletter to inform members about local, national and international JCI events, projects and news. Include a calendar, eye-catching photographs and vibrant active stories that showcase how members are creating positive change in the community. Remember to use consistent writing and design elements (font size and color, margins, etc) throughout the newsletter to present a professional image.

2. E-newsletter

An e-newsletter is less expensive to produce and quicker to read than a print newsletter. Alert members to upcoming events and use hyperlinks to draw members to your website. Include a calendar of events, short sections with lots of information and a navigation section at the top. Remember: keep it short.

Remember:

- Value. If you're e-news is valuable to members, they'll read it regardless of the frequency – although once a day is probably too much. Likewise, if it's not valuable to your members, they won't read it once a year.
- Feedback. Seek feedback to make sure what you think matters, actually matters to your members.
- Respect privacy. Always offer an unsubscribe option, and respect it.
- Keep it short. You should be able to read an e-newsletter in five minutes or less.
- Keep it simple. Make it easy to navigate, so members can find the information they want quickly and easily.

Resources: Check out the JCI Be Better E-Newsletter from the JCI World Headquarters for ideas and inspiration to build your e-newsletter. Subscribe on the JCI homepage.

3. Website

A website is a powerful tool with far-reaching implications. See the Website Administrators Guide for the ins and outs of obtaining a JCI website.

Your website can focus mainly on members, but don't forget the potential members and sponsors who will find it as well.

Include simple navigation, strong writing that is free of jargon and abbreviations and clear explanations of your Local Organization as well as JCI on the national and international levels. Remember to constantly update the site to provide new and relevant information.

4. Other Printed Materials

Brochures and other print materials are useful as educational material for current and former members for informational and inspirational purposes. In the age of technology, sometimes it's nice to receive something you can hold.

Remember to present a professional image that is consistent with the JCI brand by proofreading your work and using consistent design elements throughout your publications.

5. Social Media

With online social media, you can interact with several members at one time, and allow them to react to your Local Organization. These can be powerful tools to promote events and begin conversations online. Social media are online forums that allow users to post content or messages and interact with one another in addition to viewing others' content.

Social media include social networking sites (Facebook, MySpace, LinkedIn or Workut), blogging sites or mini-blogging (Twitter) and YouTube. Most importantly, use what your members use.

Audience: tech-savvy members and former members who are connected.

JCI LOCAL ACTION GUIDE

External Communications

The job of communicators within a Local Organization focuses mostly on members. But don't forget about nonmembers. These individuals represent your future members, partners, future partners, friends of the organization and the community you are seeking to serve.

Communicating with nonmembers is vitally important to the success of your JCI Local Organization. Creating effective communications with nonmembers will increase the amount and quality of opportunities you will encounter.

PLANNING

To ensure the most effective communications, lay out a clear plan before executing the communication. Consider the following steps before you begin.

1. Target audience

In any communication there is a specific audience that you are attempting to reach. Define your audience before moving forward, as it directly affects what you are trying to communicate.

Externally, your audiences may be partners and sponsors, potential members or the local community. Consider both the message you want to communicate with the specific audience, and also what they need to know and are interested in.

2. Goals

There are some basic communications goals that will be a part of every communication, such as furthering the JCI Mission, Vision and Values. However, set specific goals for each individual communication that are directly connected to the audience that the communication is reaching.

External communication goals may include:

Partners/Sponsors

- Communicate the value that JCI offers
- Present the change and impact that JCI has had on the community
- Continue communication to create a strong, ongoing partnership

Potential members

- Present information and background on JCI and your Local Organization
- Inspire and motivate the individual
- Call them to action to become a member of your Local Organization

Community

- Spread the JCI Mission
- Create a strong, positive image of JCI in the community
- Gain support from the community

3. Plan of Action

Draft a plan of action to help make decision about your message and how it will be delivered. As you think through the best course of action, consider the right time and right place to reach your target audience. Craft your message to be relevant, interesting and authentic to your audience.

EXECUTION

Once a plan is set, it is time to choose the output for the communication. The audience and goals of the project will help you decide which communication tactic will best suit the project.

1. E-mails/Courtesy notes

E-mails, or other communication for following up with a potential partner, potential member or journalists, are your responsibility. Follow-ups are essential because they keep a two-way communication going. The e-mail



should always be professional, as concise as possible, and provide the essential information for the recipient.

2. Press Release

A press release is a written statement distributed to the media. It is an accepted form of communication between the institution and the reporter. It is an opportunity to transmit facts and point-of-view. Press releases can announce a range of JCI-related activities: scheduled events, community projects, awards, member achievements, etc. A straight recitation of facts and statistics does not tell a story. Good press releases use facts, statistics and quotes to tell a story and present and validate a point of view. Once the press release has been sent out, you must follow up. Contact each media outlet and make sure that the press release was received, and ask if they have any questions. Remind them of your contact information.

3. Press Kit

A press kit is an invaluable tool that is primarily an information tool to give to journalists. It can be useful to print journalists, which include newspapers and magazines, broadcast journalists, including radio and television broadcast, and are especially useful during press conferences.

The press kit should include background information about JCI and your Local Organization, a press release, additional press contacts on the issues, endorsements from experts and other organizations, and if being used in a press conference, statements by press conference speakers on your letterhead with contact details

4. Interviews

Interviews can be an effective way to spread your message through local television and radio. Once contact has been made with an interested local media outlet, an interview can be a great way to get your message out.

During the interview, keep in mind a few objectives: maintain professional composure under pressure, communicate clear, concise, positive messages, sell your message, yourself, as well as the organization, and communicate competence and confidence.

5. Advertising

Advertisements are space or time for promotion in a media outlet. Advertising can be extremely expensive, but for certain open events, small ads or bulletins targeted to websites and small local newspapers may help you reach a wide audience. The viewers will judge your advertisement against the standard of the other others commonly seen in that media. If it does not equal the quality of the advertisements around, it can have a negative effect. Do in-depth research into the prices, outlets demographics, schedules and deadlines before selecting this option.

6. Websites

Websites are a great communication tool to use with your JCI members, however it is important to remember that members are not the only people who will use your website.

To maintain a user-friendly website, keep in mind the following:

- **Navigation:** Make sure that the website is easy to navigate. Information is easy to find and flows in a logical sense.
- **Word use:** Do not use jargon. Unfamiliar terms may be intimidating and frustrating for an outsider looking for information on your website.
- **Content:** The website may be used by nonmembers primarily as a way to get more information about your organization. Remember to provide basic information about JCI and your Local Organization, and make it easy to find for nonmembers.

7. Signage

Every material that is produced for an event, has the JCI logo or refers to JCI is communicating something with the people who see it. Banners, flags, apparel and pins are all examples of materials that have the JCI name and logo on them. It is important to always keep in mind what each thing is saying by itself and grouped with the rest of the environment.

8. Creative Marketing

Sometimes the best way to get your message out is to think outside of the box. The ultimate goal of communications is to create a lasting, positive image of JCI. Fresh, creative ideas are memorable, so they have the power to make your communications more effective!

JCI LOCAL ACTION GUIDE

Website Administration

Websites are essential tools of communication today. To make the most of your website, adapt your writing style and organization to a Web format to maximize your effectiveness. Writing for print and the Web are different.

First, create a JCI website. To obtain a free JCI website, send the name of your National Organization and Local Organization, and the Web administrator's name and e-mail to:

Information Technology
Assistant Jennifer Heim
(jheim@jci.cc)
Requests are processed in two
business days

PRINT VS. ONLINE

People read differently online than in print. Readers scan instead of reading straight through. On the Web:

- Text is split into hyperlinked pages, unlike print, where it is one complete document. Keep pages independent with clearly marked pages, so readers can enter your site at any point and understand the content.
- Cut your words in half. It's slower to read online, and readers skim.
- Update your site frequently. Outdated information looks unprofessional. Fresh content gives readers a reason to return often.

WRITING FOR THE WEB

Be straightforward

Be clear, concise and direct so the reader knows immediately what they're reading, and can find what he or she is looking for easily.

Most important first

Put your most important ideas first so the reader doesn't miss it. Maintain clear organization to help readers find what they're looking for quickly.

Keep it simple

Long, complex sentences are difficult to read on the Internet. Keep it simple.

Be active

Use active verbs to draw readers in and keep their attention.

Use keywords

Because Web readers are usually on a mission to find a particular topic on your site, using keywords in headings and throughout pages will help them find what they're looking for. If a search engine user is looking for Web articles about the UN Millennium Development Goals, you can help them find the subject on your website with the following heading:

- "JCI members work toward the UN Millennium Development Goals

Or, because the first part of sentences show up in search engines, try this one:

- "The UN Millennium Development Goals: JCI members take action

Be honest

Because readers don't know where your information is coming from, credibility is even more important online. Take the time to establish your own credentials, cite your sources, and always be honest.

ORGANIZATION

How you organize your website is important in helping people make the most of your site.

Headings

Use headlines that are informative, short and meaningful. Web readers scan for information, rather than reading all content. Effective headings:

- Divide material into segments to make content easier to find
- Direct readers to what they're looking for
- Capture their interest and draw them in
- Use strong, active verbs. "Program Connects Members to Global Network" is better than "Members Become Part of New Network"
- Clearly mark the content of each section



Lists and tables

Breaking information into lists or tables makes it easier to read, more visually interesting and easier to find. As you write, look for information that would fit well or make more sense in a bullet-point list or a table, such as dates, suggested action steps or responsibilities.

Captions

Photo or illustration captions are another way to draw readers into your Web page. Use captions to identify the photo or illustration and draw the reader into a story.

Web paragraphs

Shorter paragraphs suit Web reading better. Longer paragraphs are more intimidating visually. Limit each paragraph to a single thought so a scanning reader doesn't miss the second half of the paragraph. Use the word count on your word processor to ensure your paragraphs aren't too long.

LAYOUT

Use a clear layout to enhance the readability and scannability of your text. Keep in mind:

Fonts

- Don't capitalize long phrases or sentences unnecessarily. Words in all capital letters are difficult to read.
- For emphasis, use bold or italicized fonts.
- Use the default font sizes in HTML format so it appears in the correct size.
- Choose your colors for background and text carefully. Black text on a white background shows up the best. Print an example of your page or look at it on different browsers to see how your text and background colors look together to ensure the text is visible.

Sentences

- Don't underline phrases that aren't hyperlinks. Because hyperlinks are underlined, people assume all underlined phrases are linked. Don't use blue for fonts for the same reason.
- Be careful to keep your line length not too long or too short. Both are tiring when reading on the Web.

NAVIGATION

When you finish your site, have a person who is unfamiliar with it test it to see if he or she can use it easily and find the important aspects. This is a good test of how intuitive your navigation is. Points to consider:

- **Hyperlinks**
Links guide your reader to the most important information in your document, avoid repetition, connect them to supporting details and aid scannability. Links are for people who want to learn more about an individual topic. However, don't overdo it. Too many links become difficult to read.
- **Grouping**
Group your content into chunks to anticipate how your readers will look at it. This allows readers to access all the information they need about a particular topic without jumping around.
- **Printing**
Think about printing when you design your pages. Make sure the text is not too wide when it's printed. Preview your pages, and test the printing. Also, leave margins.
- **Fragmentation**
Don't divide your information into chunks that are too small. If there is not sufficient information for an entire section of text, consider combining sections.

TERMS TO AVOID

Don't use words or phrases that refer to Web use. Write effectively online by not drawing attention to the Web. Test your writing by printing out the page and checking if it makes sense when it's not online. Words to avoid include:

- "Click here"
- "follow this link"
- "this Web site"

JCI LOCAL ACTION GUIDE

Planning Meetings

Overall planning makes the Local Organization's meetings more effective. With effective planning, you can announce definite dates, secure the best speakers, announce programs and promote them well in advance and avoid meeting cancellations due to lack of speaker or programs.



RESPONSIBILITIES

As Local President, remember that the success of the meeting depends on you and the local Board of Directors. Keep in mind that:

1. Meetings without purpose are wasted efforts.
2. Pick a meeting place that is centrally located and adapted to the purpose, cool or warm according to the season and quiet and free from interruption.
3. Attendance is a pre-requisite to successful meetings. To insure good attendance, notify everyone expected or desired to attend sufficiently in advance regarding all details.
4. Physical arrangements are another important contributing factor to the success of the meeting. Consider the following points in planning the seating arrangements:
 - a. Choose chairs that are as comfortable as possible, preferably with full or half arms. Whenever possible avoid uncomfortable folding chairs.
 - b. For large meetings, seating capacity should be ample. For small groups it is better to have a few chairs, with others readily available, than to have too many set up.
 - c. Arrange chairs according to the purpose of the meeting: Rows or semi-circles facing the chairperson are for informal and short meetings. Round tables are ideal for Board meetings where writing and work must be accomplished. School or theater arrangement are suitable for formal or meeting with large attendance and where parliamentary procedures are used.
5. The meeting should start and end at a scheduled time. If additional time is needed, another meeting can be scheduled or the attendants can vote to add extra time to the current meeting. In both cases the issue must be voted by the meeting participants.

RECOMMENDATIONS

Here are some important aspects in the planning of a successful meeting:

1. **Agenda.** With rare exception, the President or Secretary prepare the agenda for distribution to members prior to the meetings. A prepared agenda will expedite the meeting and make it more productive.
2. **Minutes.** The Secretary keeps minutes and distributes copies of the minutes from the previous meeting at the start of each meeting. Approval or amendment of such minutes should be the first thing on the agenda.
3. **Length.** If the President runs the meetings properly, most should be kept within a two-hour limit. You will find that it adds greatly to the morale of the members if the meetings do not use up an entire evening, unless absolutely necessary.
4. **Advance notification.** In most cases, it is the responsibility of the Secretary to notify the members about the meeting and send the agenda outlining responsibilities, reports expected and the purpose of the meeting.

CHECKLIST

PRIOR TO THE MEETING:

- Is the purpose of the meeting defined?
- Is the agenda planned and written?
- Have minutes of previous meetings been prepared and sent to the members?
- Do the officers understand on what they are expected to report?
- Has notice of the meeting, with time and location, been given to the membership?
- Has the guest speaker been contacted and confirmed the following issues:
 - The subject to be covered?
 - The time limit of the speech?
 - Who will meet the guest speaker upon his or her arrival?
 - Is the information for the introduction of the speaker ready?
- Have arrangements been made for audio-visual equipment and microphone, if needed?
- Is there a backup for the guest speaker?
- Has the meeting room been booked, room lay-out sent, including table arrangement, etc.?
- Have gifts for the speaker been arranged?
- Are the news media needed at the meeting, and have they been invited?
- Is there a need for name tags or name plates, and have they been ordered?
- Are the flags ready?
- Are the gavel, podium, head table, banner, etc., ready and placed?
- Is decoration needed?

DURING THE MEETING:

- Will the meeting start on time?
- Are officers prepared for their reports?
- Is the guest speaker ready for his or her speech?
- Are the gifts, plaques and certificates ready and handy?
- Are the agenda and other necessary supporting documents with you?
- Can you make eye contact with all members attending the meeting?
- Did you thank the members for attending the meeting?
- Did you cover all items on the agenda?
- Did every member have the opportunity to speak and give his opinion?
- Were all decisions made in a democratic way?
- Did you announce the date, place, time, and major attractions of the next meeting?
- Can you finish the meeting on time?

AFTER THE MEETING:

- Have thank-you letters been sent?
- Was the media informed about relevant issues discussed and approved?
- Have minutes been prepared?
- Have all commitments and assignments been confirmed and followed up?
- Is there any action needed as a result of a decision made during the meeting?
- Have the summary of the decisions been mailed to all members?

JCI LOCAL ACTION GUIDE

Local Meetings

Most members of a voluntary organization do not like attending meetings. The first challenge, therefore, is to reverse this attitude in your Local Organization if it exists.

Help your members understand the necessity and positive aspects of meetings. Such meetings will also provide an opportunity for fellowship and learning new skills.

If both new and experienced members look forward to the next meeting, you should be able to get good participation in other activities as well.

RESPONSIBILITIES

There are three components to good Local Organization meetings.

- **First**, there is leadership, which includes the President and the Secretary.
- **Second**, there are the physical arrangements for the meeting, usually a responsibility of the Meetings Commission.
- **Finally**, we have the participants, who include members, prospective members, guests and visitors.

We have some suggestions to offer, for each aspect.

Leadership – The President should:

1. Know the objectives of the meeting before preparing a detailed agenda, and be sure that all participants know these goals before the meeting starts.
2. Know the principles of parliamentary procedures. If your Local Organization does not have a Legal Counsel, appoint a parliamentarian.
3. Give adequate notice and details about the meeting to the membership.
4. Include an icebreaker at every meeting to establish a friendly atmosphere.
5. Keep a good standard of decorum and protocol in your meetings, but be flexible and appropriate for each occasion.
6. Limit speaking time so that the vocal few do not dominate.
7. Ensure that the Secretary keeps an accurate record of the meeting, and make his or her own notes during the meeting in case disputes arise.
8. Encourage maximum participation by those attending the meeting. The meetings are for the participants, not for the Board members.
9. Plan for variety – it is the essence of a good meeting program.
10. Have a copy of the local Constitution and the Parliamentary Procedures Manual at the head table.
11. Provide the opportunity for good internal public relations for the members and good external public relations for guests and visitors.
12. Brief members who are giving official reports.
13. Make guests and visitors feel part of the meeting.
14. Start and close the meeting on time.

Physical arrangements – the Secretary should:

1. Be responsible for setting up the meeting room, have it cleaned after the meeting and manage all the physical arrangements.
2. Ensure the correct room setup, hang up the JCI Creed, the national and JCI flags and set up audiovisual equipment and other relevant items.

RECOMMENDATIONS

1. The agenda can be as varied as the President wishes.
2. Select the types of meetings that best suit your membership. Take into account their occupations, working hours, interests and ambitions. Some types of meetings include luncheon meetings (brief), breakfast meetings (brief), dinner meetings (full length), etc. Ask members for suggestions.
3. Parliamentary procedures and protocol should be incorporated into the meetings to allow for maximum participation and free expression. If you observe these rules, you will have orderly meetings, all will have the opportunity to be heard, decisions will be made democratically by the majority, and the rights of the minority will be safeguarded.
4. The President should start the meeting on time and make the appropriate introductions in order of importance. Keep to the agenda and his or her personal time schedule and include short breaks in the agenda. Ensure that discussions are relevant and apply meeting procedures are appropriate to the meeting. Avoid embarrassing moments and adjudicate disputes fairly. Refrain from dominating the meeting, remain impartial, and never ask those attending the meeting for advice on meeting procedures because the President should know the procedures.

5. Finally, make sure the participants understand what the meeting should accomplish. Some of the objectives include: conducting Local Organization business, listening to a distinguished guest speaker, entertaining visiting members or other guests, holding a training session for the members and receiving a series of reports about the Local Organization program. If members understand the objectives of the meeting, they will be more sympathetic toward the leadership if some difficulties are encountered.

One important point regarding eating and drinking by members during a meeting: if a meal is part of the meeting, allow time for tables to be cleared of most items before proceeding. It is not possible for members to take full part in the meeting if their neighbors are still eating or drinking. Be aware of members' habits, too. If they detract from the meeting decorum or distract participants, change the habits.

SUMMARY

Few activities are more challenging or stimulating than a well-conducted meeting. Whether it be a business session, activity meeting or a social session, members should leave that meeting thoroughly satisfied and looking forward to the next one. Everything that is accomplished in the Local Organization is planned around a good Local Organization meeting; it is imperative to conduct a successful one.

JCI LOCAL ACTION GUIDE

Chairing Meetings

Chairing a meeting or a discussion is not a passive process, nor is it simply calling on the next person whose hand is up. The chairperson is not merely a traffic policeman.

When you are presiding over a meeting, remember that you play the primary role in determining whether discussions are lively, provocative, creative and focused – or not. Keep in mind that your responsibility as a chairperson is to all members of the Local Organization, not just a few of them. Throughout the meeting, ask yourself if all members' interests are being served by the discussion.

Challenge yourself to make certain that every member speaks at least once at each meeting.

RESPONSIBILITIES

Keep the following in mind the next time you chair a Local Organization meeting:

1. **Don't hold court.** Remember that the meeting belongs to the members. You are there to facilitate discussion and the taking of action.
2. **Eye contact is the key to controlling a meeting.** Have the meeting table arranged with only you, the Past President (parliamentarian), and the Secretary sitting on one side. You cannot establish eye contact easily with someone sitting directly on either side of you.
3. **Always start the meeting on time.** If you start the meeting late to accommodate the few who always show up late, you will offend those who are there on time. Also, people who are perpetually late will be late no matter when you start the meeting. Starting the meeting on time also sends a strong signal that you respect people's time.
4. **Begin the meeting with a general overview of the work to be done.** Don't go over each agenda item, but give people a feel for the business to be conducted. It is a good way to get people into the rhythm of a meeting. It also clarifies your expectations and thus allows other members to help you move the meeting forward if it gets bogged down.
5. **Guide, mediate, probe and stimulate discussion throughout the meeting.** Allow time for ideas and thoughts to emerge from the group, even when you could abbreviate the discussion by providing the "right" answer. Any group discussion is strengthened by diversity of thinking, so take the time to draw out ideas, even from people who are less vocal. Use well-placed questions to draw out less-talkative members. Discourage people from dominating a discussion or talking on every topic.
6. **Watch for visual as well as verbal cues to see how people are reacting to the discussion.** If words say "yes," but the body language says "no," trust the body language.
7. **Deal directly with disruptive behavior by using a break to privately point out to the offender the consequence of the behaviour.** Never question the motives of the individual, simply point out how it is disrupting productive discussion. If these efforts fail, deal directly with the person during the meeting.
8. **Don't allow people to break in on a discussion.** When they do, simply indicate that you will add their name to the list of people who will speak. You will impose a discipline that allows for more orderly discussion.
9. **Keep the discussion on track by periodically restating the issue and the goal of the discussion.** This technique is a way to keep the group from drifting off the main topic or losing sight of the purpose of the discussion.
10. **Seek consensus, but remember that unanimity is not required.** Many times a good idea is diluted and reduced to a bad or ineffective idea through an effort to get the last one or two members to agree with the idea. Remember that as the President you are responsible to all members, not only the holdouts. If the vast majority of the members are in agreement, call for a vote and move on.

- 11. Put important issues to a vote. Do not make assumptions about how the members feel.** Often a vocal minority will give a false impression about how the majority of the members feel.
- 12. After a reasonable discussion, restate the issue before each vote.** Explain the consequences of the vote, and then call for the vote without further discussion. If the motion passes, indicate how follow through will be taken, and who is responsible.
- 13. End the meeting on time.** If you must run over the established time to finish, ask the group's permission, and be specific about the additional time required. If the members say it is OK, they will be attentive. If they say no, you didn't have them invested in the discussion anyway. Many times a good meeting has been ruined by dragging on well beyond the time for adjournment. And that's what people remember, rather than the good things that happened earlier in the meeting.
- 14. Close the meeting by reviewing what has been accomplished.** Let members go home feeling that their time has been well-spent. This will have a major impact on their attitude about the next meeting.

RECOMMENDATIONS

Let's examine some of the more common mistakes made by presiding officers:

- 1. Taking unnecessary votes.** Most non-controversial motions are better handled by general consent. Whenever the chairperson senses that the group is in unanimous agreement on a proposal, it is simpler and quicker to ask, "Is there any objection?" If there is none, the chairperson says, "Since there is no objection . . ." and states the action to be taken. But the President must, of course, always provide the opportunity for members to object, because if anyone does, there is no general consent, and a vote must be taken.
- 2. Cutting off discussion arbitrarily.** Many presiding officers don't understand that they don't have the power to end discussion. Only the assembly can do that, either by a vote or by general consent. The presiding officer in a democratic assembly is a servant of the assembly, not its master.
- 3. Refusal to accept a motion.** No matter how strongly the President disagrees with a motion, he or she does not have the power to refuse to let it be offered. Of course, if it is based on some

obvious misunderstanding or out of order, he may explain that fact and give the maker an opportunity to withdraw it.

- 4. Allowing personal remarks.** Discussion must be limited strictly to the subject matter at hand, with no personal innuendo. Failure to do so can result in hurt feelings and resentment, which can plague an organization for years to come.
- 5. Allowing irrelevant remarks.** In a formal meeting it is necessary that remarks be relevant to the motion under discussion. The President must tactfully but firmly insist that the motion on the floor be handled first, before other subjects can be discussed.
- 6. Remain impartial.** In some committee meetings the President may not need to remain neutral, but in large membership meetings it is essential. The President should not take sides in a controversy, remaining as an impartial referee. If he feels so strongly on the subject that this is impossible, the gavel should be turned over temporarily to another officer until the matter has been settled.
- 7. Protect the rights of an unpopular minority.** The President should prevent the majority from pushing a proposal through before both sides have had an opportunity to speak. The President should try to alternate the floor between proponents and opponents of the measure.
- 8. Restate a motion before taking vote.** The President must repeat the motion so that everyone is aware of the exact words. If the motion is complex, he has a duty not only to repeat it but also to make sure everyone understands what a vote for or against it will mean.
- 9. Confirm, after the vote, what has been decided.** After the vote the President should state clearly what the meeting has just voted to do. This serves two purposes: it confirms for the members what has been decided, and it simplifies the Secretary's job in keeping accurate minutes.
- 10. Know parliamentary procedures.** A few minutes spent prior to a meeting with a parliamentary procedures manual can ease the mind and make the meeting better for all concerned.

SUMMARY

Local meetings are often one of the best opportunities to motivate and retain members. A well-conducted meeting, with plenty of opportunities for all members to participate will keep members enthusiastic and willing to continue their membership, as well as looking forward to the next meeting.

JCI LOCAL ACTION GUIDE

Parliamentary Procedures

JCI Local and National Organizations throughout the world advocate for and practice parliamentary procedure for many reasons. Apart from the obvious advantages in leadership training and disciplined thinking that comes from concise debate and clearly led discussion, the introduction of parliamentary procedures gives an objective lesson in working democracy.



PHILOSOPHY

Parliamentary procedures ensure:

- **Orderly** meetings;
- **Opportunities** for all to be heard;
- **Decisions** by the majority;
- **Protection** for the minority.

There are many sets of rules guides to effective action in meetings. Each is designed to permit free discussion and free decisions. This guide on parliamentary procedures is based on *Robert's Rules of Order* and does not attempt to give a complete picture of parliamentary procedures, nor does it hope to cover every situation that can come up in a meeting. However, it will provide a good understanding of how proper meeting procedures can help your Local Organization in conducting its business sessions.

SPEAKING RIGHTS

Speaking is accomplished by obtaining the floor. One should rise and address the presiding officer. The one who should be recognized is the person who rises first after the floor has been yielded by the previous speaker. If more than one person properly requests the floor when debate is one, certain rules apply:

1. The maker of the motion is first even though the last to rise, so he can explain the motion.
 2. No one gets a second chance until everyone has had one chance to speak.
 3. The chairperson should try to alternate speakers among all sides of an issue.
- **Speaking** is not usually in order until the presiding officer indicates who is entitled to speak. Once recognized, the speaker should first give his name and, if in a representative group, he should state whom he represents.
 - **Speaking** follows the making of a motion. If a report is presented, its reading precedes a motion. Following the motion, the reader of the report has the first opportunity to speak.
 - **Speaking** is limited in order to give everyone an opportunity to speak. The group can impose more or less restrictive rules.
 - **Speaking** can be stopped altogether by a motion. But this motion requires a two-thirds majority of those voting, so that a bare majority cannot prevent discussion and the minority can be heard.

THE MOTION

The motion is the means whereby the group takes action. It is a statement of what is to be done and how it is to be done. It should be carefully worded to prevent misunderstandings. The wording should clearly channel discussion to the important aspects of the proposal.

The motion is made by stating, "I move that the... (*name of the group*)... (*add what is to be done, by whom, when, how financed, etc.*)."

Normally, it should be seconded. This means the seconding person believes the motion should be discussed. On occasions, the purpose of a seconder is to ensure that the matter is at least of sufficient interest to be presented to the group, and thus the seconder prevents one person from wasting the group's time.

Parliamentary law is designed to insure that the group considers only one motion at a time. This prevents confusion and speeds action, and it is the presiding officer's duty to remind the group constantly which action is the main topic.

However, the requirements of getting a job done – and preventing a small but vociferous minority from keeping a group in session or wasting time on inconsequential matters – demand that certain motions receive precedence. These have specific objectives which deserve early consideration by the group.

When these motions are made, they immediately become the pending problem of the group and must be decided first. It is important to remember that only the motion with precedence is then before the group, even though any number of subsidiary, incidental, or privileged motions are, so to speak, on the floor.

Confusion will not result if the presiding officer keeps the group well informed and explain what has happened, what is happening, and what will happen next.

TYPES OF MOTIONS

The use of parliamentary forms over a period of time has resulted in the establishment of certain terminology which itself has specific parliamentary meanings. The terms often vary as to the group using them.

Lay on the Table: A motion to delay, to an indefinite time, consideration of a main motion by taking it figuratively from the floor, where action can be taken, and laying it on the table, where action cannot be taken. This helps to allow more time to consider the problem, yet does not set a definite time for reconsideration.

Take from the Table: A majority of voters who tabled the motion can later figuratively take the motion from the table and put it on the floor for discussion. When this is done, the motion comes back to the floor in the

same condition as it went on the table (with the same wording).

Main Motion: A motion to accomplish a part of the business of a group. All other motions are, in a way, procedural, while the main motions get the work done.

- **Examples:** Adopt a project, approve a report, create a committee, etc.

Subsidiary Motions: A motion generally designed to facilitate action on a main motion – a motion subsidiary to the main motion.

- **Examples:** To debate, amend, refer to a committee, lay on the table, etc.

Incidental Motions: These motions are incidental to the consideration of business and accomplish certain parliamentary purposes.

- **Examples:** Questions of order and appeal, suspension of the rules, objection to consideration of a question, etc.

Privileged Motions: A motion is privileged when it requires an immediate decision in regard to the subject matter to which it relates, rather than to the subject matter of another motion that may have been on the floor.

Amendments: Amendments are not always necessary, but if someone wishes to change a motion, he may move the adoption of an amendment. This can be done at any time during the discussion. The amendment can be further amended, and more amendments can be offered, but at any one time only the main motion, the amendment, or the amendment to the amendment, can be on the floor.

VOTING

After discussion has been completed, the vote should be taken. First a vote is taken on the amendment to the amendment (if any); then the vote is taken on the amendment (as either amended or as originally presented, depending on the previous vote); and finally on the main motion (as either amended or as presented, depending on the previous votes.)

JCI LOCAL ACTION GUIDE

Local Project Planning Process

JCI Local Organizations around the world conduct projects to provide their members the development opportunities that empower them to create positive change in their communities.

Projects provide an opportunity for members to practically develop organizational, planning, team-building, leadership and management skills. It is also the medium by which young people around the world can best create positive change.

The image and effectiveness of the Local Organization, as well as the performance of the individual members, are reflected in the results of each and every project.

Thousands of organizations around the world conduct projects in thousands of communities but what makes JCI projects unique is that they provide opportunities that empower members to create positive change.



THE JCI PROJECT

JCI Local Organizations conduct projects for one purpose: to fulfil the Mission of the organization. Every project around the world must aim to provide opportunities that empower young people to create positive change.

The Three-Step Test

Before conducting any project, consider the following steps as guidance to determine if a project is aligned with the JCI Mission.

1. Development opportunities

The organization exists for members. Local Organizations provide avenues for members to take advantage of the opportunities JCI offers. All local must offer opportunities for members to develop themselves.

2. Empower young people

There is great power in young people uniting for a common good. If there are more young people acquiring skills from development opportunities, then young people in the community will be empowered, and likely to have a greater impact in their communities.

3. Create Positive Change

Positive change is the ultimate goal of JCI. The opportunities and the empowerment of young people leads to positive change. Projects must be sustainable and leave lasting impact, creating a better community. Members take action to implement projects that are relevant to the community, addressing issues of common concern to the community at large.

It's necessary to get the community as a whole involved in the planning process. Here are some helpful steps.

PROJECT PLANNING.

STEP 1: SURVEY

A comprehensive community survey is the best way to discover the needs of the community.

Include questions about community problems and needs. Possibilities include:

1. **Public Survey** – asking questions of people on the streets.
2. **Leader Survey** – asking questions of a cross section of community leaders.
3. **Representative Survey** – asking questions of a selected representation of the public.
4. **Panel Discussion Survey** – attending a public meeting where qualified individuals speak on the issues under consideration.

The selection of questions plays a key role in the success of the survey. Consider the following types of questions:

1. **True or false, yes or no** – only one answer required.

JCI LOCAL ACTION GUIDE: Local Project Planning Process

- 2. Multiple choice** – different options are offered for selection.
- 3. Factual** – asks for specific answers or facts, such as, "how many movie theaters are in the city?"
- 4. Opinion** – asks for a point of view.
- 5. Priority listing** – a list of needs is presented, and a priority order is requested.

STEP 2: ANALYSIS

After the survey, the Local Organization analyzes the results, listing the community needs in order of priority for study. A survey report with the results must be produced and presented to the Local Organization, community leaders, and the media.

The next step is to make a priority list of the projects that most urgently need attention, and appoint a project chairperson for them.

Even though the Local Organization should take immediate action to resolve the problems revealed by the survey, the very act of implementing the survey, making the analysis, and reporting the results has been a positive community contribution.

STEP 3: PLANNING

A well-organized team for implementing each project is the foundation for success.

Ensure success by assigning project to a committee under the leadership of a project chairperson.

His or her first task is to guide committee members to think the project through, step-by-step.

The plan of action must include the following:

1. The mission or purpose of the project.

Establish the reason why the committee is conducting the project. It must identify the project's aims in one sentence that can easily be understood by everyone involved.

2. The key activity areas.

The project must be divided into different key activity areas, such as finances, promotion, records, administration, etc.

3. The objectives in each area.

Major objectives must be established in each key area. They must be achievable and easily understood by the members of the committee.

5. Action steps in each objective.

The strategies must be broken down into small action steps that show exactly what should be done and who is responsible.

After the plan of action is completed, the following information will be needed: a chronological order of events or actions; a time schedule; a budget; an outline of duties for each committee member; and a list of outside organizations, resources and people involved.

After submitting the plan of action to the Board of Directors, the Local Organization must approve it and show commitment to the project.

STEP 4: ACTION

In the action phase, the project gets underway, and all participants perform their responsibilities.

This phase requires important skills from the project chairman, such as delegation, supervision, communications, personnel management, public speaking, etc. When allocating responsibilities, keep in mind that sacrifices have to be made; members have to give up free time and forego leisure interests until the project is over.

STEP 5: EVALUATION

Evaluation will be the natural concluding step for the project. The project may have been an outstanding success, but still not have satisfied the need or accomplished the mission.

If failures occur, it is important for the learning process in JCI to find out why, and what can be done to avoid the same mistakes in future projects.

The evaluation is often overlooked because participants feel that the completion of the project is sufficient.

SUMMARY

At the end of the project, the committee can take pride in their achievement and feel satisfied that the experience has developed them as individuals, enhanced the Local Organization's image, and improved the community.

JCI LOCAL ACTION GUIDE

Local Project Plan of Action

Planning is a prerequisite to accomplishing goals. Following a plan of action consists of assessing *now* what should be done in the *future* to effectively fulfill the mission and objectives of the project or activity.



PLANNING PROCESS

A plan of Action is not a schedule of events (which only specifies the activity and when it is to take place), or a list of things to be done to achieve the objective. A plan of Action must answer the following questions:

1. Why was this project established? – The mission or purpose.

The mission or purpose of a project or activity is the reason for its existence, the definition of its purpose. Each project is unique and will have its own mission, but it must be closely related to the Local Organization's and JCI Mission:

"To provide development opportunities that empower young people to create positive change."

The project must meet the three step test;

- Provide development opportunities for members
- Employ young people
- Create positive change in the community

2. Where will the project committee concentrate its efforts? – The Key Result Areas.

The mission should now be divided into Key Result Areas, which will determine where the committee and the members should invest most of the time, talents, energy and money.

The Key Result Areas are the areas where you will focus primary attention and where **results**, not activities **are significant**.

3. What do we want to do? – The Objectives.

Objectives form the basis for determining what activities to perform.

Objectives also help to establish criteria for evaluating how well the activities are being conducted. An objective is a statement of a result to be achieved and must start with the word "to" followed by an action verb. It must be **clear**, **achievable** and **measurable**.

4. Who will coordinate or manage this action? – The Person Responsible.

Each objective must clearly indicate who will be responsible for the coordination of the action and the accomplishment as well as the development of strategies and the assignment of new responsibilities to each strategy.

5. When should it start and be completed? – The Deadlines.

The objective must also state dates to begin and end or a time period within which the result is to be accomplished.

6. How much is it going to cost? – The Budget.

The objective must stipulate the maximum investment the Local Organization is willing to authorize.

7. How will each objective be done? – The Action Steps.

The objective is now divided into smaller steps, which are general actions

to accomplish the objective. The action steps must also indicate the person responsible, the deadline, and the cost.

After the above process is completed, spread the actions over the yearly calendar.

THE PLANNING SCHEDULE

Take the following steps during the development of the project plan of action:

1. Draft of the plan of action is made.

The Project Chairperson and other key members prepare a draft of the plan of action for the project.

2. The Project Committee amends draft.

The Project Committee discusses the draft and amends if necessary.

3. Final Proposal goes to the Board of Directors.

The proposal is submitted to the Vice President responsible for the project and amends if necessary.

4. New Project Committee incorporates the changes approved by the Board.

The final plan of action is now printed and distributed to all project members.

5. Project members prepare their plans.

Each project member prepares another plan of action after receiving his or her assignments and responsibilities for various objectives.

6. Individual plans are approved.

Each member plan of action is approved by the Project Chairperson. The cost and deadlines can now be set for all activities.

7. Design project schedule of events.

The committee can now spread the activities over a calendar and send it to all project members with the deadlines and assignments.

8. Supervisors follow up on their teams' duties.

Now is the time for action, and the immediate supervisors of each member should follow up with their team members to make sure that everything is going according to plan and schedule.

9. Evaluation and recommendations for the future are made.

The Project Chairperson and Vice President should evaluate the progress every month and make recommendations on actions to be included in a future project.

10. Report and recommendations for future projects.

Careful analysis is made and concrete recommendations are presented to make future projects better and avoid mistakes that happened on this project.

SUMMARY

Whatever the purpose for writing a plan of action is, don't think of it as cast in stone once it is printed. Review your plans constantly for updates or whenever circumstances in the project change significantly.

List of JCI Official Courses

JCI Official Courses, with the JCI preceding the name, are the courses considered by the JCI Training Commission as essential for the progress of the organization and development of the membership. The **JCI Official Courses** must be organized online, conducted by certified trainers and all participants must personally register online. There is no fee from JCI by organizing any **JCI Official Course**. Organizers must cover the trainers' expenses, logistic costs and the participants manuals can be printed onsite by the course organizer.

These are the current **JCI Official Courses** available:

JCI Achieve, the **JCI Local Organization Development Course** is a full day course that uses discussions and case studies to understand and establish the local organization's identity, its purpose and what to do to accomplish JCI's Mission, effectively adopt and use recognizable and appreciated activities, understand the existing demographic groups and their characteristics and how to build a attractive organization that will bring in new members who are looking for the development opportunities and want to create positive change as active citizens. **JCI Achieve** should be taken by all members who want to fully understand the meaning, purpose and dynamics of building an attractive JCI local organization.

JCI Admin is the **JCI Local Organization Management Course** is a full day course recommended for all new local board members or any member who wants to become a leader at any level in the local organization. The course covers the structure of the local board, management of the local organization affairs, the conducting of meetings, planning and the importance of having community activities for the achievement of JCI's Mission. **JCI Admin** should be taken by all members who want to fully understand the dynamics of the management, administration, planning and meetings of a local organization.

JCI Presenter is a full day course designed for all JCI members who want expand their presentation skills in order to make better project reports and intervene during meetings. This course focuses on the concepts of creating and delivering an effective presentation utilizing visual aids and strong delivery methods with a mind towards understanding the audience. During the course, participants will participate in several presentation activities; create and deliver a presentation; participate in activities that demonstrate the process to create an effective presentation and explore opportunities to enhance presentation self-confidence. **JCI Presenter** is required to attend **JCI Trainer**.

JCI Trainer is a two day course that covers adult learning styles, the best training methods to teach adults, the training tools and other techniques you need to understand to deliver training for adult audiences. **JCI Trainer** should be taken by those who graduated from **JCI Presenter** and want to develop their confidence in presenting complex information in an understandable and interesting way, and increase your ability to motivate others.

JCI Designer, the **JCI Training Designers Course** is a three day course that introduces techniques and tools trainers can use to design training courses with detailed trainers' instructions, participants' handouts and visual aids that will enable other trainers to efficiently conduct the course. **JCI Designer** is aimed to prepare trainers who have already proven their talents in the training field for a new dimension of training design.



JCI Mission

“To provide development opportunities that empower young people to create positive change.”

JCI Vision

“To be the leading global network of young active citizens.”

About JCI

JCI is a worldwide community of young active citizens ages 18-40 who share the belief that in order to create positive change, we must take collective action to improve ourselves and the world around us. With over 5,000 Local Organizations in more than 115 countries and territories, JCI forms a vibrant international network with nearly 200,000 members. Engaging in activities ranging from community development to international projects, members demonstrate their social responsibility and improve themselves through participation, leadership and action. The global citizens of JCI are committed to becoming better leaders to build a better future for all.

