Chapter Plan of Action

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Use this template planning guide to assist in your chapter's annual planning.

(This template follows the Active Citizen Framework)

MAIN GOALS (Complete after Parts 1-3. Use this portion to include high-level goals of the chapter and not individual needs/solutions.)

1. _____
2. _____
3. _____
4. _____
5. _____

PART 1 - ANALYZE

☐ Complete Community Survey (Use social media or other tools to determine the needs of your community.)

(Examples: eradication of poverty, food insecurity, recycling, literacy, etc.)

List 3 Community Needs:

1. _____
   _____

2. _____
   _____

3. _____
   _____

☐ Complete Membership Survey (Use email, call/text. or other tools to determine the goals of your members.)

(Examples: social/business networking, leadership trainings, etc.)

List 3 Membership Goals:

1. _____
   _____

2. _____
   _____

3. _____
   _____

☐ Complete Board Survey (Conduct a Board of Directors planning session to determine your BoD members' goals.)

(Examples: Membership Recruitment/Retention, activation of current membership, public relations, etc.)

List 3 Board Goals:

1. _____
   _____

2. _____
   _____

3. _____
   _____

PART 2 - DEVELOP

Using the information gained during the Analyze portion brainstorm problems that need to be addressed and ways to provide sustainable change. (Do not feel the need to fill in every available space and, if need be, add more spaces to each section.)

Community Needs:
- Problem: _____
    - Solution:

        _____

        _____

- Problem: _____
    - Solution:

        _____

        _____

- Problem: _____
    - Solution:

        _____

        _____

Membership Goals:
- Problem: _____
    - Solution:

        _____

        _____

- Problem: _____
    - Solution:

        _____

        _____

- Problem: _____
    - Solution:

        _____

        _____

Board Goals:
- Problem: _____
    - Solution:

        _____

        _____

- Problem: _____
    - Solution:

        _____

        _____

- Problem: _____
    - Solution:

        _____

        _____

PART 3 - EXECUTE

Using the information gained during the Develop portion brainstorm projects or initiatives that will implement the solutions. (These are not meant to be full project plans or a complete list of all projects to be done throughout the year. Use these potential projects/initiatives to complete PMG's throughout the year. In the case of a Board of Directors initiative or effort list how the BoD will implement the solution.)

Project/Initiative 1: _____

- Project/Initiative Description

_____
_____
_____
_____

Project/Initiative 1: _____

- Project/Initiative Description

_____
_____
_____
_____

Project/Initiative 1: _____

- Project/Initiative Description

_____
_____
_____
_____

PART 4 - OVERVIEW

Strengths (List your chapter's strengths.)

- _____
- _____
- _____

Weaknesses (List your chapter's weaknesses.)

- _____
- _____
- _____

Recruitment Goal - Recruit _____ new members per month with dues of $_____/year.

Retention - Our current membership is _____ members as of Jan. 1.

   We have _____ up for renewal in the First Quarter.
   We have _____ up for renewal in the Second Quarter.
   We have _____ up for renewal in the Third Quarter.
   We have _____ up for renewal in the Fourth Quarter.

PART 6 - BUDGET (Actual amounts to be completed throughout the year.)

Expenses	Amount Planned	Actual
Total Expenses		
Income		
Total Income		
Total Profit/Loss		

PART 7 - BOARD OF DIRECTORS

Position: _____

- Board Member Name: _____
- Phone: _____
- Address: _____
- Email: _____

Position: _____

- Board Member Name: _____
- Phone: _____
- Address: _____
- Email: _____

Position: _____

- Board Member Name: _____
- Phone: _____
- Address: _____
- Email: _____

Position: _____

- Board Member Name: _____
- Phone: _____
- Address: _____
- Email: _____

Position: _____

- Board Member Name: _____
- Phone: _____
- Address: _____
- Email: _____

Position: _____

- Board Member Name: _____
- Phone: _____
- Address: _____
- Email: _____

Position: _____

- Board Member Name: _____
- Phone: _____
- Address: _____
- Email: _____

This concludes the annual Plan of Action. Use the following Review portion to keep track of the implemented projects/initiatives/changes throughout the year.

PART 8 - REVIEW

(Using the information gained during the Develop and Execute review each quarter and how the projects/initiatives conducted during the quarter helped to provide the sustainable changes from the Develop portion and the Main Goals of the chapter for the year. Use the projects' official PMG's for complete review of each project. Add space if needed.)

First Quarter Review (January-March)

- Project Name: _____
    - Summary: _____
    _____
    - Positives: _____
    _____
    _____
    - Negatives: _____
    _____
    - Did this project move the chapter forward in its Main Goals for the year? _____
- Project Name: _____
    - Summary: _____
    _____
    - Positives: _____
    _____
    - Negatives: _____
    _____
    - Did this project move the chapter forward in its Main Goals for the year? _____
- Project Name: _____
    - Summary: _____
    _____
    - Positives: _____
    _____
    - Negatives: _____
    _____
    - Did this project move the chapter forward in its Main Goals for the year? _____
- Other actions that promoted the chapter's Main Goals:
    _____
    _____
    _____
- How have the strengths of the chapter increased and weaknesses been used to grow?
    _____
    _____
    _____
- The chapter has completed _____% of the Civic Leadership Certification.
- We recruited _____ new members and retained _____.
- We (did) (did not) hold monthly Board of Directors Meetings.
- We (did) (did not) hold monthly Membership Meetings.

Second Quarter Review (April-June)

- Project Name: _____
    - Summary: _____

    _____

    _____
    - Positives: _____

    _____

    _____
    - Negatives: _____

    _____

    _____
    - Did this project move the chapter forward in its Main Goals for the year? _____
- Project Name: _____
    - Summary: _____

    _____

    _____
    - Positives: _____

    _____

    _____
    - Negatives: _____

    _____

    _____
    - Did this project move the chapter forward in its Main Goals for the year? _____
- Project Name: _____
    - Summary: _____

    _____

    _____
    - Positives: _____

    _____

    _____
    - Negatives: _____

    _____

    _____
    - Did this project move the chapter forward in its Main Goals for the year? _____
- Other actions that promoted the chapter's Main Goals:

    _____

    _____
- How have the strengths of the chapter increased and weaknesses been used to grow?

    _____

    _____

    _____
- The chapter has completed _____% of the Civic Leadership Certification.
- We recruited _____ new members and retained _____.
- We (did) (did not) hold monthly Board of Directors Meetings.
- We (did) (did not) hold monthly Membership Meetings.

Third Quarter Review (July-September)

- Project Name: _____
    - Summary: _____
    _____
    _____
    - Positives: _____
    _____
    _____
    - Negatives: _____
    _____
    _____
    - Did this project move the chapter forward in its Main Goals for the year? _____
- Project Name: _____
    - Summary: _____
    _____
    _____
    - Positives: _____
    _____
    _____
    - Negatives: _____
    _____
    _____
    - Did this project move the chapter forward in its Main Goals for the year? _____
- Project Name: _____
    - Summary: _____
    _____
    _____
    - Positives: _____
    _____
    _____
    - Negatives: _____
    _____
    _____
    - Did this project move the chapter forward in its Main Goals for the year? _____
- Other actions that promoted the chapter's Main Goals:
_____
_____
- How have the strengths of the chapter increased and weaknesses been used to grow?
_____
_____
_____
- The chapter has completed _____% of the Civic Leadership Certification.
- We recruited _____ new members and retained _____.
- We (did) (did not) hold monthly Board of Directors Meetings.
- We (did) (did not) hold monthly Membership Meetings.

Fourth Quarter Review (October-November)
- Project Name: _____
    - Summary: _____
    _____
    _____
    - Positives: _____
    _____
    _____
    - Negatives: _____
    _____
    _____
    - Did this project move the chapter forward in its Main Goals for the year? _____
- Project Name: _____
    - Summary: _____
    _____
    _____
    - Positives: _____
    _____
    _____
    - Negatives: _____
    _____
    _____
    - Did this project move the chapter forward in its Main Goals for the year? _____
- Project Name: _____
    - Summary: _____
    _____
    _____
    - Positives: _____
    _____
    _____
    - Negatives: _____
    _____
    _____
    - Did this project move the chapter forward in its Main Goals for the year? _____
- Other actions that promoted the chapter's Main Goals:
_____
_____
- How have the strengths of the chapter increased and weaknesses been used to grow?
_____
_____
_____
- The chapter has completed _____% of the Civic Leadership Certification.
- We recruited _____ new members and retained _____.
- We (did) (did not) hold monthly Board of Directors Meetings.
- We (did) (did not) hold monthly Membership Meetings.

Annual Review

1. Project Name: _____
   - Summary: _____
     _____
     _____
   - Positives: _____
     _____
     _____
   - Negatives: _____
     _____
     _____
   - Did this project move the chapter forward in its Main Goals for the year? _____
2. Project Name: _____
   - Summary: _____
     _____
     _____
   - Positives: _____
     _____
     _____
   - Negatives: _____
     _____
     _____
   - Did this project move the chapter forward in its Main Goals for the year? _____
3. Project Name: _____
   - Summary: _____
     _____
     _____
   - Positives: _____
     _____
     _____
   - Negatives: _____
     _____
     _____
   - Did this project move the chapter forward in its Main Goals for the year? _____
4. Project Name: _____
   - Summary: _____
     _____
     _____
   - Positives: _____
     _____
     _____
   - Negatives: _____
     _____
     _____
   - Did this project move the chapter forward in its Main Goals for the year? _____

5. Project Name: _____
   - Summary: _____
   _____
   _____
   - Positives: _____
   _____
   _____
   - Negatives: _____
   _____
   _____
   - Did this project move the chapter forward in its Main Goals for the year? _____
6. Project Name: _____
   - Summary: _____
   _____
   _____
   - Positives: _____
   _____
   _____
   - Negatives: _____
   _____
   _____
   - Did this project move the chapter forward in its Main Goals for the year? _____
7. Project Name: _____
   - Summary: _____
   _____
   _____
   - Positives: _____
   _____
   _____
   - Negatives: _____
   _____
   _____
   - Did this project move the chapter forward in its Main Goals for the year? _____
8. Project Name: _____
   - Summary: _____
   _____
   _____
   - Positives: _____
   _____
   _____
   - Negatives: _____
   _____
   _____
   - Did this project move the chapter forward in its Main Goals for the year? _____
9. Project Name: _____

- Summary: _____
  _____
  _____

- Positives: _____
  _____
  _____

- Negatives: _____
  _____
  _____

- Did this project move the chapter forward in its Main Goals for the year? _____

10. Project Name: _____

- Summary: _____
  _____
  _____

- Positives: _____
  _____
  _____

- Negatives: _____
  _____
  _____

- Did this project move the chapter forward in its Main Goals for the year? _____

11. Project Name: _____

- Summary: _____
  _____
  _____

- Positives: _____
  _____
  _____

- Negatives: _____
  _____
  _____

- Did this project move the chapter forward in its Main Goals for the year? _____

12. Project Name: _____

- Summary: _____
  _____
  _____

- Positives: _____
  _____
  _____

- Negatives: _____
  _____
  _____

- Did this project move the chapter forward in its Main Goals for the year? _____

- We completed _____ projects throughout this year.

- Other actions that promoted the chapter's Main Goals:

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

- How have the strengths of the chapter increased and weaknesses been used to grow?

_____
_____
_____
_____
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_____
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_____

- The chapter has completed _____% of the Civic Leadership Certification.
- We recruited _____ new members and retained _____.
- We (did) (did not) hold monthly Board of Directors Meetings.
- We (did) (did not) hold monthly Membership Meetings.