**(Chapter Name)** **Annual Chapter Plan**

**(Year)**





**Contact Information**

**Chapter Email:**

**Microsite (Chapter Profile Page):**

**Facebook:**

**Other Social Media:**

**Other Key Links:**

**Mission**

The Chapter mission is the written expression of the basic goals, values, and ideals that are important to your Chapter and what it hopes to accomplish. It’s the driving force behind everything that your team does, and serves as an anchor to stay on track and not lose sight of the big picture. Your mission may need to be adjusted based on the value your Chapter brings to your members, and it’s important to analyze this on an annual basis.

*Things to keep in mind when writing your Chapter’s mission statement:*

* *What do we do?*
* *How do we do it?*
* *For whom do we do it?*
* *What is important to us?*
* *What value are we bringing to our community and our members?*

**Our Mission:**

**Reflection**

*Each year or each time the Chapter transitions leadership, we suggest your leadership team reflects on the successes and challenges from the previous year, and that Chapter goals, activities, and outreach is aligned to learnings from the previous year. You can use the below worksheet to guide your outgoing and incoming leadership team on a reflection process together:*

| **LIKED**What was good from last year? | **LEARNED**What did we learn from last year? |
| --- | --- |
| **LACKED**What did we lack last year? | **LONGED FOR**What did we long for last year? |

**Leadership Structure**

*Putting your leadership team in one place along with their key responsibilities will make it easier to reference back to in the future. If you are wondering what key roles and responsibilities to include in your leadership team, check out some examples on the* [***Chapter Leader Hub***.](https://www.netimpact.org/chapter-hub)

**Questions to consider when determining your Leadership Structure:**

* *Is your Chapter advised by anyone, such as a faculty advisor, advisory board, or group of previous leaders? If not, we suggest incorporating an element to your leadership structure so that your Chapter can have continuity, retain institutional knowledge, and save time by knowing what’s worked in the past.*
* *Are diverse voices represented on your Chapter’s leadership team? How does your Chapter ensure values of* [*justice, diversity, equity, and inclusion*](https://netimpact.org/chapter-leader-hub/diversity-and-inclusion) *are incorporated into the Chapter’s decision making process? Consider incorporating a JEDI Officer on your leadership team if not, or implementing other regular processes into decision making to ensure a diverse representation of voice.*
* *How often will your leadership team meet to ensure updates are communicated to your Chapter?*

*Fill this out based on your leadership team for this year. Aim to create a team with a mix of years so there’s a pipeline of leaders for future leadership teams.*

| **Name** | **Email** | **Position** | **Responsibilities** |
| --- | --- | --- | --- |
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**Leadership Goals for the Year**

*What are the 3 main things you want to accomplish as a leadership team this year and what steps are you going to take to accomplish them?*

**Questions to consider when determining your Leadership Goals:**

* *Does your Chapter represent the diversity within your community? If not, consider incorporating a goal around increasing* [*justice, diversity, equity, and inclusion*](https://netimpact.org/chapter-leader-hub/diversity-and-inclusion) *in your Leadership team’s regular practices and goals for the year.*
* *Are your goals ambitious and aligned with the desires and needs of your community? Can your leadership team clearly articulate the needs of your community and match each goal to one of those needs? If not, consider using surveys or focus groups with your existing members to understand what they want before setting goals for the Chapter.*
* *Are your goals measurable? What metrics will your Chapter use to measure the success of each goal?*
* *Do your goals support the Chapter in not only increasing impact, but also increasing sustainability of the Chapter? How could your Chapter create goals around improving the leadership transition process, creating more consistent engagement, or improving connection within your Chapter?*

| **Goal #1:** |
| --- |
| Actions needed to achieve goal |  |
| Metric used to measure success |  |
| Responsible individual(s) |  |
| **Goal #2:** |
| Actions needed to achieve goal |  |
| Metric used to measure success |  |
| Responsible individual(s) |  |
| **Goal #3:** |
| Actions needed to achieve goal |  |
| Metric used to measure success |  |
| Responsible individual(s) |  |

*Resource:* [*The Essential Guide for Writing Smart Goals*](https://www.smartsheet.com/blog/essential-guide-writing-smart-goals)

**Membership Recruitment**

*What are the 3 ways you are going to recruit members? Need ideas? Check* [***these***](https://www.netimpact.org/resources/recruiting-and-engaging-members) *out.*

**Questions to consider when strategizing Membership Recruitment:**

* *Does your outreach and recruitment strategy include reaching new parts of your community? If not, how could your Chapter incorporate recruitment strategies that tap into new audiences?*
* *How can you leverage partners (such as local companies, your school, or other Net Impact Chapters) to recruit new members?*
* *How does your Chapter position itself within your community? Could the Chapter position itself in a way that attracts new members?*
* *Does your Chapter have barriers to entry that prohibit diverse new members from joining the Chapter? If so, how could these barriers to entry be removed to engage diverse voices within your Chapter?*
* *How is your Chapter creating immediate and close connections with new members?*

| **Recruitment/Outreach Strategy #1:** |
| --- |
| Target Audience |  |
| Outreach goal (ie reach 500 individuals through x social media posts) |  |
| Responsible individual(s) |  |
| **Recruitment/Outreach Strategy #2:** |
| Target Audience |  |
| Outreach goal |  |
| Responsible individual(s) |  |
| **Recruitment Strategy/Outreach #3:** |
| Target Audience |  |
| Outreach goal |  |
| Responsible individual(s) |  |

**Member Gatherings/Intra-Chapter Networking**

*It’s important to consider how your Chapter will maintain communication and relationship building within your Chapter, whether that is synchronously (through meetings, gatherings, events, or programs) or asynchronous (through newsletters, Slack, forums, peer to peer mentoring, etc). Will your Chapter hold member meetings/gatherings? If so, how often will you meet and what content will be covered in member meetings? What resources would be needed to run regular member gatherings?*

*Alternatively, will most of the Chapter’s communications happen through a newsletter or asynchronous communication? If the Chapter connects primarily through asynchronous communication, how else might you create intra-Chapter connection building opportunities?*

**Questions to consider when strategizing Member Gatherings/Intra-Chapter Networking:**

* *What does a member get out of attending meetings/gatherings?*
* *Are there ways to create or improve asynchronous communication with your Chapter, such as improving or implementing a Chapter Newsletter or creating a Chapter Slack Community?*
* *Do your members have an opportunity to provide anonymous feedback when engaging in member meetings? Anonymous feedback can allow members to feel welcome to express their opinion and provide suggestions to help the Chapter become more engaging, inclusive, and welcoming.*

Our Chapter’s plan for member gatherings/intra-Chapter networking:

| **Is the Chapter going to hold regular gatherings/meetings?** |
| --- |
| Resources needed |  |
| Responsible individual(s) |  |
| Content covered |  |
| **How will the Chapter communicate asynchronously?** |
| Asynchronous communication method |  |
| Responsible individual(s) |  |
| Content covered |  |

**Chapter Communications**

*What are the 3 most important ways you are going to communicate with members? Need ideas? Check* [***these***](https://www.netimpact.org/resources/recruiting-and-engaging-members) *out.*

**Questions to consider when strategizing Chapter Communications:**

* *Could your Chapter improve asynchronous communication, that is communication outside of live events, programs, meetings, or gatherings?*
* *Does your Chapter have a way to manage updated information on each member for effective communication? How does your Chapter keep records of alumni or previous Chapter members, and how are those individuals incorporated into Chapter communications?*
* *Do your Chapter Communications include updates and opportunities from Net Impact Central, such as* [*Virtual Events*](https://netimpact.org/regenerative-economy) *and* [*Programs*](https://netimpact.org/programs)*?*
* *Does your Chapter tell diverse stories within your external marketing? If not, how could your Chapter incorporate more diverse voices in your storytelling and internal + external communications?*

| **Communication Strategy #1:** |
| --- |
| Actions needed to achieve strategy |  |
| Metric used to measure success |  |
| Responsible individual(s) |  |
| **Communication Strategy #2:** |
| Actions needed to achieve strategy |  |
| Metric used to measure success |  |
| Responsible individual(s) |  |
| **Communication Strategy #3:** |
| Actions needed to achieve strategy |  |
| Metric used to measure success |  |
| Responsible individual(s) |  |

**Chapter Finances**

*What are the 3 most effective ways you are going to fund your activities? Need ideas? Check* [***these***](https://netimpact.org/chapter-leader-hub/securing-funds) *out. [For students] Find out what resources your campus has to support your Chapter finances by registering with your school as a club or organization. What expenses should the Chapter be aware of to incorporate into the Annual Budget? What supporting documents does the Chapter have to support financial planning?*

**Questions to consider when strategizing Chapter Finances:**

* *Does your Chapter leverage local resources, such as partnerships with local non-profits, funding from your school (for student Chapters), or pro-bono support from partners? If not, how can your Chapter work to secure additional sources of funding?*
* *Does your Chapter collect dues from members? Does that create a barrier for engaging diverse members of your community?*
* *Are Net Impact Chapter dues incorporated into your Chapter’s annual budget (student Chapters only)?*
* *Does your Chapter have a system for ensuring information related to finances (budgeting strategy, access to documents, contacts for sponsorship, process related to school/organization funding, if student Chapter, etc)?*

*Annual Budget and Financial Planning Worksheet*

| **Sources of Funding (and notes on securing sponsorships/funding sources)** |
| --- |
| Funding Source 1 |  |
| Funding Source 2 |  |
| Funding Source 3 |  |
| **Expenses** |
| Marketing Expenses |  |
| Communication Expenses |  |
| Membership Support Expenses |  |
| Program Expenses |  |
| Event Expenses |  |
| **Supporting Documents** |
| Link 1 |  |
| Link 2 |  |
| Link 3 |  |

**Chapter Events, Activities, and Initiatives**

*What are 4 new activities the Chapter is going to do this year? Need ideas? Check* [***these***](https://netimpact.org/chapter-leader-hub/toolkits-and-event-ideas) *out.*

*We recommend at least 4 activities that are a mix of professional development, education, and hands-on projects. The most important thing is to match programming with member interest. Consider* [*justice, diversity, equity, and inclusion*](https://netimpact.org/chapter-leader-hub/diversity-and-inclusion) *across your Chapter’s events, activities, and initiatives. If you’d like to go above and beyond, check out how your Chapter can get* [*Gold Status*](https://www.netimpact.org/chapter-hub-awards)*.*

* Idea 1: Net Impact Central [Programs](https://www.netimpact.org/programs) and [Virtual Events](https://netimpact.org/regenerative-economy)
* Idea 2:
* Idea 3:
* Idea 4:

**Leadership Transition Plan and Timeline**

[***Leadership transitions***](https://netimpact.org/chapter-leader-hub/leadership-teams-and-succession-planning) *are so important for your Chapter’s activities to continue smoothly, and for all the work each leadership team puts into their role gets passed along. The transition process takes multiple months to be performed properly, including outreach, cultivating potential leaders, holding elections, and having at least one month of overlap between former and newly elected leaders – so start planning now! You can find an example of a transition timeline* [***here***](https://netimpact.org/chapter-leader-hub/annual-planning).

| **Month** | **Action** |
| --- | --- |
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**Recommended First Year Chapter Timeline and Goals**

*As your first year progresses, you can enjoy Net Impact Central Programs and develop your own customized events. Every Chapter is unique but we wanted to provide an overview of the first year. We recommend customizing this timeline to best suit the needs of your Chapter and its members.* 