



LOCAL ACTION GUIDE

Local President

Being elected a Local President is both an honor and a responsibility. You represent your fellow members and the interests of the organization in every decision. You must understand your fellow members' motivations and needs and earn their respect.

JCI members have a choice as to their level of involvement and investment. They have chosen you, just as they have chosen to dedicate themselves to creating positive change through JCI. They come to JCI to find their own power to improve the world, positively impact the lives of others, become part of a global network and find personal purpose creating positive change. A deep understanding of the organization's purpose and its members is key to leading in the right direction.

You have been elected to serve as the leader of a non-profit membership-based organization – your Local Chapter. A Chapter's primary goal, unlike a for-profit company, is to fulfill the JCI Mission: **To provide development opportunities that empower young people to create positive change.** As Local President, it is your responsibility to mobilize your members to act on this Mission. Because you have only one year to lead, you must build on impactful exciting initiatives and strategies while encouraging new ideas and improvements. Your role is to foster cooperation, nurture a positive outlook and lead with vision.

As a leader, the responsibility will weigh heavily on your shoulders at times. The job may be challenging and sometimes frustrating, but after your year ends, you will see that those challenges are what makes the role of Local President the most fulfilling and enriching position in JCI.

GOALS

1. Align all Activities with the JCI Mission

The JCI Mission represents our organization's purpose for existence. Everything we do must be based on it. As a Local President, you, along with your Board of Directors, will be approving your organization's projects. This process allows you to evaluate initiatives through the lens of the JCI Mission.

2. Implement the Plan of Action

Be familiar with the JCI international Plan of Action and the local plan of action accepted for your year while you were a candidate. Consider the current financial state of the organization and its capabilities. Include goals for membership growth, anticipating the loss of some members during the year. Use the JCI Active Citizen Framework to analyze the needs of the community and maximize the effectiveness of projects. This will ensure the projects will be relevant to the current situation and make a local impact.

3. Maintain JCI Strategy

If your Local Chapter already has a long-term strategic plan in place, ensure its continuity from year to year. Your Local Chapter may also have more in-depth strategies for specific areas. If it is time to revise or improve the strategy, refer to the JCI Strategic Plan as a framework. The JCI website also provides guides for local planning in the areas of marketing, membership growth and more. Each Local Chapter must contribute to accomplishing the international strategic plan so all of JCI can move in the same direction and advance as a global organization.

REPRESENTING JCI

As Local President, you are the primary representative of the Jaycees in your community, both internally and externally.

Internally, you represent your Local Chapter on the national and international levels. You also represent your members to other JCI Local Chapters in your area. Ensure that the image you project reflects positively on the JCI brand and serves as a model for others. Even outside of JCI activities, you still represent JCI, so be mindful of your actions and your choices in an external setting.

Externally, it is your responsibility to understand your Local Chapter's place in the greater community. It is your role to speak to community officials and members of the press about JCI and your local activities. Be aware of local challenges and the initiatives of other civic organizations. This will help you both in choosing which projects to do and prepare you for dialogue with community leaders.



MANAGING YOUR LOCAL CHAPTER

- Plan and chair meetings
- Supervise projects and activities and monitor progress
- See that activities and attitudes are conducive to membership growth
- Delegate tasks to implement the plan of action and local long-term strategy
- Establish clear expectations and deadlines
- Hold members accountable for progress
- When you receive a status report, give timely and constructive feedback as well as encouragement
- Maintain control of the budget and cash flow, and review the budget regularly
- Prepare a report to the general membership at the end of your term on results and achievements.

National Resources

Stay informed about national programs, partnerships and deadlines to take advantage of the national services and recognition opportunities. Sign up for national communications and stay in contact with your State President or assigned National Vice President.

International Resources

The national website, www.usjaycees.org, is your best resource for staying up-to-date on international events, programs and activities. If you are in need of assistance or guidance, the website is the first place to go for tools and guides. Ensure that you have an active user account on the members' website. This is the most convenient way for you to fulfill your job of informing your members of JCI international events, trainings and programs.

LEADING YOUR MEMBERS

Build a strong team around you

Take responsibility to lead your Board of Directors. Organize and conduct training for all your officers at the beginning of the year. To create a simple and natural division of activities among the Vice Presidents, JCI suggests two categories of Vice Presidents: Internal and External. If you do not have an Executive Vice President as part of your Board of Directors, one of your roles will be to oversee the Vice Presidents and allocate activities among them. See the Executive Vice President action guide for details.

Ensure that each member has the support they need and is taking action to fulfill their role. Guide

- members with potential to take leadership roles as directors or chairpersons. Monitor progress and reassign duties if they are not being fulfilled. Maintain an open and respectful communication to build a culture of cooperation and teamwork.
- **Understand members' needs and expectations**
Cultivate personal relationships with your members to make them feel comfortable sharing their thoughts and ideas. Listen with an open mind so you can take their opinions into account in decisions.
- **Inspire and motivate members**
JCI members participate because of a desire to contribute, serve and belong. It is your responsibility to consistently rekindle their passion for JCI and inspire them to contribute more. Internal conflict distracts members from the JCI Mission. So, maintain an organizational culture of respect, honesty, diversity of thought and tolerance for differing opinions so members remain motivated. Recognize members for their achievements throughout the year and plan a formal recognition of your Board of Directors for the end of the year.
- **Model parliamentary procedure and protocol**
As you will be chairing all meetings, you'll need to become very familiar with parliamentary procedure and prepare for the meetings well in advance. Know local protocol in order to avoid possible offense to visiting dignitaries, guests or members. Most members learn protocol and parliamentary procedure by watching others, so model proper behavior at all times. Ensure meetings provide a welcoming environment for discussion among members.

LOOKING TO THE FUTURE

Ensure a plan for the NEXT year

While you are in charge of your Local Chapter this year, the most important legacy you can leave is a strong, prepared successor. Preparing qualified leaders to take over after you is the only way your organization will survive.

Participate and lead the transition between the incoming and outgoing Board of Directors. Examine the structure to see if it fulfills the needs of the Local Chapter. Share your experience with the incoming leaders, both negative and positive to avoid repeating mistakes and continue successful practices. By doing this, you will sustain positive change in the future.



LOCAL ACTION GUIDE

Local Executive Vice President

While some Local Chapter and State Associations do not have this position, larger organizations may add this role to streamline leadership and communications. The Executive Vice President has the role of supervising the Vice Presidents and assisting in local presidential duties.

When you are elected as Local Executive Vice President, you are taking a position that often leads to the presidency. You will work side by side with the President during their year of office, preparing for a future local leadership role.



UNDERSTUDY THE LOCAL PRESIDENT

- 1. Learn the responsibilities of the Local President**

The Local President represents your Local Chapter both internally and externally. The President also manages the Local Chapter, leveraging national and international resources. The role also includes leading and motivating members. This is your chance to have a first-hand preview of what presidency entails.
- 2. Learn about the JCI structure nationally and internationally**

As a local member, you were primarily focused on local issues and projects. Now as a higher-level board member, you must widen your view and learn the structures, roles and policies that run JCI at national and international levels. This helps you understand how your organization fits in the broader picture of JCI and the world.
- 3. Assist the President**

The Local President oversees many responsibilities in the day-to-day management and leadership of the organization. It is your role to assist in these responsibilities according to the Local President's needs. If there are any tasks you are unfamiliar with, this is your opportunity to learn about them and try them. The role of the President can be challenging, and you have the power to help them solve problems, foster a team spirit and strengthen the organization.
- 4. Step in for the President when needed**

The Local President may not be able to attend every meeting or every event. They will look to you to step in to chair meetings, supervise and represent the organization.

COORDINATE PLANNING

Plan of Action

One of your major tasks as Executive Vice President is to supervise the creation of the upcoming year's plan of action. In accordance with the JCI Active Citizen Framework, a community needs analysis will form the basis of your work in the community for the following year. If this has not recently been done, take the lead on conducting a broad community needs assessment. Use these results to determine which projects continue to be relevant based on the changing needs of the community.

Your close partnership with the President and strong involvement in the Local Organization will allow you to assess current internal goals and see what has been successful and what has not. Use this insight when creating the new plan of action to continue best practices and form new goals in relation to membership growth, communications, and procedure.

While drafting the new plan, reference the international plan of action so your local priorities match international goals.

Strategic Plan

Another major task as Executive Vice President is to supervise the compliance of your Local Organization with your local strategic plan. Every Local Organization must have a plan that goes beyond its yearly activities. The strategic plan creates a map for the future of the Local Organization. It identifies strategic goals and ways by which those goals can be accomplished over a period of time.

Be very familiar with your Organization's plan and the progress that has been made. If three to five years have passed since the creation of the current plan,

COORDINATION OF DIRECTORS/CHAIRPERSONS

Once you have chairpersons appointed to cover all of the internal responsibilities, work with the chairpersons to allocate specific tasks among the committees throughout the year. Consider workload, interests and experience when assigning projects. If one committee gets overloaded, consider appointing another chairperson to divide the responsibility. If a project director/chairperson oversees more than 10 committee members, consider helping them create subcommittees.

Keep close contact with all the directors/chairpersons so you can assist them as needed. Make sure the responsibility is distributed fairly and that each director/chairperson feels valued and supported.

As a Vice President, you also need to keep in contact with the other Vice Presidents, especially the others assigned to the internal category. Be mindful that many projects may have external as well as internal components, so communicate accordingly with all Vice Presidents. Pay attention to the reports of all other Vice Presidents so that you are informed about what other projects might have a component that relates to your area of responsibility. Even at community events, there may be elements relating to the responsibility of Vice Presidents for Internal Affairs.

PROJECT MONITORING

Once you have your chairpersons and committees in place, your main role is to oversee and monitor the status of their projects and activities. Periodically attend their committee meetings and stay in close contact with all the chairpersons to receive updates on their progress. Make sure the committees know how to contact you if they have questions or problems along the way.

Depending on the committee's area of activity, they may already have an existing plan in place. Committees that are more project- or event-based will need to create a plan for each new activity. Work with them to ensure they are aware of the tools available to assist with these planning processes. Recommend that they access the online project planning tool available in the members section of www.jci.cc and that they read the Project Planning Action Guide. These tools will help them step-by-step through the planning and execution process, which will not only help them, but also make your management role easier.

Once a project is underway, make sure the committee is measuring their progress and their impact throughout the process. The committee should record the result or response to every action taken.

For example, for a teamwork training for members, the committee should record details prior to the training about the level of teamwork efficiency existing in the organization. Keep track of how many people were invited, what methods were used to contact them, what was the response rate, how many people attended, what were the results of the survey of attendees, and how teamwork efficiency changed in the organization after the training. Data of this type will allow the committee and you to effectively evaluate the strengths and weaknesses of the initiative. Compare these results to the goals set out in the project plan to create a complete evaluation of the activity and make informed decisions in the future.

When the project is complete, help the committee prepare a report to the local Board of Directors, the local membership and on the JCI website to create a record and to share the successes and challenges. Your experience will not only help your local members, but also other members around the world.

Local Vice President for Internal Affairs

Being elected a Local Vice President is both an honor and a responsibility. You represent your fellow members and the interests of the organization in every decision. You must understand your fellow members' motivations and needs and earn their respect.

As Vice President, you are the member of the Board of Directors who is closest to the grassroots action that is the driving force behind the positive change JCI creates in your community. The types of activities that you oversee are the lifeblood of your Local Organization. They propel the growth and advancement of the organization.

APPOINTING DIRECTORS/CHAIRPERSONS

One of the first things you'll need to do as Vice President is look at the local plan of action and work with your Local President to determine which goals fall into your assigned area of responsibility. Once familiar with your objectives for the year, start to consider how many people and committees you need to help you meet these objectives. There may be existing directors/chairpersons in place, but you may determine that additional committees need to be formed. Below are some ways to find members to oversee specific duties.

1. **Survey**
Work with the Board of Directors to create a membership survey where members can indicate their interests for the year. Depending on your areas of responsibility, this may lead you to a pool of new candidates.
2. **Discuss in a membership meeting**
Reserve a time on the agenda of a membership meeting to discuss your needs with the members and ask for volunteers for your committee needs.
3. **Make a personal invitation**
After having reached this level of leadership, you have worked with many of your fellow members and know their strengths and interests. If a particular person stands out as being a good candidate for the role, approach them and suggest that they take a responsibility as a director/chairperson for a committee. Share with them why you think they are a good candidate and that you will support them. This may motivate them to accept a role they may not have thought of before.

AREAS OF INTERNAL RESPONSIBILITY

To create a simple and natural division of activities among the Vice Presidents, JCI suggests that the following types of activities be assigned to the Vice President(s) for Internal Affairs:

- **Membership management**
This includes oversight of membership orientation, involvement and retention. Those working in the membership management area will work closely with those responsible for community outreach, who would fall under the responsibility of the Vice President(s) for Internal Affairs. Refer to related action guides for details.
- **Training and member skills development**
This includes JCI Official Courses as well as other JCI Training or skill development seminars. Officer training, project management and other nonprofit management topics would be organized by the committee assigned to this area.
- **Internal Communications**
This includes any communications to local members, via the local websites, newsletters or other publications.
- **JCI Events**
This includes coordinating information and participation in regional, national and international events such as National Conventions, JCI Area Conferences, JCI Global Partnership Summit and JCI World Congress.
- **JCI Programs**
This includes JCI Programs that are related to individual members skills and organizational operations such as 100% Efficiency, Awards, World Public Speaking Championship, World Debating Championship and Twinning.

COORDINATION OF DIRECTORS/CHAIRPERSONS

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Keep close contact with all the directors/chairpersons so you can assist them as needed. Make sure the responsibility is distributed fairly and that each director/chairperson feels valued and supported.

As a Vice President, you also need to keep in contact with the other Vice Presidents, especially the others assigned to the internal category. Be mindful that many projects may have external as well as internal components, so communicate accordingly with all Vice Presidents. Pay attention to the reports of all other Vice Presidents so that you are informed about what other projects might have a component that relates to your area of responsibility. Even at community events, there may be elements relating to the responsibility of Vice Presidents for Internal Affairs.

PROJECT MONITORING

Once you have your chairpersons and committees in place, your main role is to oversee and monitor the status of their projects and activities. Periodically attend their committee meetings and stay in close contact with all the chairpersons to receive updates on their progress. Make sure the committees know how to contact you if they have questions or problems along the way.

Depending on the committee's area of activity, they may already have an existing plan in place. Committees that are more project- or event-based will need to create a plan for each new activity. Work with them to ensure they are aware of the tools available to assist with these planning processes. Recommend that they access the online project planning tool available in the members section of www.jci.cc and that they read the Project Planning Action Guide. These tools will help them step-by-step through the planning and execution process, which will not only help them, but also make your management role easier.

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When the project is complete, help the committee prepare a report to the local Board of Directors, the local membership and on the JCI website to create a record and to share the successes and challenges. Your experience will not only help your local members, but also other members around the world.

Local Vice President for External Affairs

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APPOINTING DIRECTORS/CHAIRPERSONS

One of the first things you'll need to do as Vice President is look at the local plan of action and work with your Local President to determine which goals fall into your assigned area of responsibility. Once familiar with your objectives for the year, start to consider how many people and committees you need to help you meet these objectives. There may be existing directors/chairpersons in place, but you may determine that additional committees need to be formed. Below are some ways to find members to oversee specific duties.

1. **Survey**
Work with the Board of Directors to create a membership survey where members can indicate their interests for the year. Depending on your areas of responsibility, this may lead you to a pool of new candidates.
2. **Discuss in a membership meeting**
Reserve a time on the agenda of a membership meeting to discuss your needs with the members and ask for volunteers for your committee needs.
3. **Make a personal invitation**
After having reached this level of leadership, you have worked with many of your fellow members and know their strengths and interests. If a particular person stands out as being a good candidate for the role, approach them and suggest that they take a responsibility as a director/chairperson for a committee. Share with them why you think they are a good candidate and that you will support them. This may motivate them to accept a role they may not have thought of before.

AREAS OF EXTERNAL RESPONSIBILITY

To create a simple and natural division of activities among the Vice Presidents, JCI suggests that the following types of activities be assigned to the Vice President(s) for External Affairs:

- **Community engagement and outreach**
This includes working with external sources to analyze the needs of the community. According to the JCI Active Citizen Framework, a needs analysis of your entire community should be performed every one to three years to create targets for action. This will lead to greater public awareness of JCI. Work closely with the partnership committee to identify potential partners. Refer to the JCI Active Citizen Framework needs analysis tools for details.
Another facet of community engagement is identifying potential members as you develop relationships with external entities. When you meet an individual that fits the JCI profile, invite them to a meeting and refer them to the membership management committee. Work closely with that committee for membership management, who would fall under the responsibility of the Vice President for Internal Affairs. Refer to related action guides for details.
- **Community project management**
This includes all hands-on projects that are run in the local community that specifically address problems identified in the needs analysis and the UN Millennium Development Goals. There may be one or more committees in this area of activity, depending on the number of community projects are being run at any given time. These projects will serve as showcase projects for your Local Organizations, demonstrating the tangible impact created by JCI in your community.
- **Advocacy and awareness**
This includes championing solutions to problems identified in the needs analysis and the UN Millennium Development Goals that cannot be solved by JCI in your community. This might include advocating for policy changes at the local government or raising

- awareness of a problem so that you can gain the support needed to create the solution.
- **Partnership and sponsorship management**
This includes identifying among your community stakeholders individuals and entities that share the same goals and values as JCI. Members working in this area of activity reach out to potential partners, develop mutually beneficial agreements to work together to improve the organization and the community. This also includes maintaining partner relationships long-term.
- **External communications**
This includes any communications to external stakeholders and the media, via the local website, newsletters, press releases or other publications.
- **External JCI Programs**
This includes running JCI Programs that target and serve those outside of the membership, such as JCI Nothing But Nets, UN Global Compact, JCI TOYP and JCI CYEA.

COORDINATION OF DIRECTORS/CHAIRPERSONS

Once you have chairpersons appointed to cover all of the external responsibilities, work with them to allocate specific tasks among the committees throughout the year. Consider workload, interests and experience when assigning projects. If one committee gets overloaded, consider appointing another chairperson to divide the responsibility. If a project director/chairperson oversees more than 10 committee members, consider helping them create subcommittees.

Keep close contact with all the directors/chairpersons so you can assist them as needed. Make sure the responsibility is distributed fairly and that each directors/chairperson feels valued and supported.

As a Vice President, you also need to keep in contact with the other Vice Presidents, especially the others assigned to the external category. Be mindful that many projects may have internal as well as external components, so communicate accordingly with all Vice Presidents. Pay attention to the reports of all other Vice Presidents so that you are informed about other projects that might have a component that relates to your area of responsibility. Even at member events, there may be elements relating to the responsibilities of Vice President(s) for External Affairs.

PROJECT MONITORING

Once you have your chairpersons and committees in place, your main role is to oversee and monitor the status of their projects and activities. Periodically attend their committee meetings and stay in close contact with all the chairpersons to receive updates on their progress. Make sure the committees know how to contact you if they have questions or problems along the way.

Project Plan

Depending on the committee's area of activity, they may already have an existing plan in place. Committees that are more project- or event-based will need to create a plan for each new activity. Work with them to ensure they are aware of the tools available to assist with these planning processes. Recommend that they access the online project planning tool available in the members section of www.jci.cc and that they read the Project Planning Action Guide. These tools will help them step-by-step through the planning and execution process, which will not only help them, but also make your management role easier.

Measuring Impact

Once a project is underway, make sure the committee is measuring their progress and their impact throughout the process. The committee should record the result or response to every action taken.

For example, for a community project that targets child health through vaccinations and hygiene skills, the committee should record details including the demographics of the community targets, child health statistics for that group, how many families were invited to participate, what methods were used to contact them, what was the response rate, how many people received treatment or training, and how did statistics, such as rate of disease, change after the project. Data of this type will allow the committee and you to effectively evaluate the strengths, weaknesses and impact of the initiative. Compare these results to the goals set out in the project plan to create a complete evaluation of the activity and make informed decisions in the future.

Reporting

When the project is complete, help the committee prepare a report to the local Board of Directors, the local membership and on the JCI website to create a record and to share the successes and challenges. Your experience will not only help your local members, but also other members around the world.

Local Secretary

Being appointed or elected to the position of Local Secretary is a recognition of your loyalty to the organization. This shows a respect for your capabilities to organize efficiently and manage details within a constant flow of information. This position also recognizes your integrity and trustworthiness.

The Local Secretary oversees and executes all administrative duties of the Local Organization. This person serves as organizer and communicator for the Board of Directors and membership as a whole. Though the role may seem simple, every step is crucial to the smooth day-to-day operations of the organization.

ASSISTING MEETING PREPARATION

The Local Secretary facilitates effective and efficient meetings, along with the Local President. Good meetings encourage membership involvement and the basis for the organization of all local decisions, action and initiatives. Make sure you are very familiar with meeting procedure and the Local Organization Constitution. Ensure the following steps are followed for each meeting:

- 1. Meeting time and date**

The planning of any meeting starts at the end of the previous meeting. Ensure that the time, date, location and focus of the next meeting are confirmed at that time.
- 2. Prepare agenda**

Work closely with the Local President to prepare the agenda well in advance. Be available to all the members and the Board of Directors so they can contact you with agenda items. Post the agenda on the website for members to view well in advance so they can prepare for relevant items.
- 3. Meeting notifications**

Work with those in charge of internal and external communications to send out meeting reminders to all members, potential members and/or relevant community stakeholders. Include the time, date, location, directions, agenda and any other logistic information necessary for them to arrive prepared and on time.
- 4. Check the venue**

Before the day of the meeting, confirm all logistic details with the venue, including time, room capacity, room setup, technical requirements, Internet availability and/or refreshments.
- 5. Prepare documents and venue**

Print any agendas, fliers, sign-up sheets or other documents that might be needed at the meeting. Arrive at least 30 minutes prior to the start of the meeting to check that the tables and chairs are set up properly, as well as any audio-visual equipment and refreshments.
- 6. Take minutes**

At the meeting, sit near the person who is chairing the meeting so you can clearly hear all motions and all main points. Record all decisions made at the meeting and any other points stated for the record.
- 7. Clean-up**

After the meeting, make sure you assist the host in leaving the room as clean as you found it. Take any stray papers or items that remain after attendees have left. This is important to leave a positive impression of your Local Organization to the host venue.
- 8. Send minutes**

Within a few days, work with those in charge of communications to send out meeting minutes to all attendees, members and stakeholders interested in the topics discussed. These minutes should include the time, date and location of the next meeting.

ASSISTING THE BOARD OF DIRECTORS

The other main duty of the Local Secretary is to act as a liaison between the membership and the board of directors. The Secretary organizes all records of the Local Organization, making them a key source of information.

Duties include:

- **Keep records**

Organize all agendas and minutes from past meetings so they are easily accessible for reference. This may seem nonessential, however when questions arise about official decisions, or an outside

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- entity asks to access the records, these documents become crucial. Also, keep an archive of photos from every event throughout the year. Contact the person responsible after each major event to request a copy of the photos for the archive. This will also serve as a backup for this very important evidence of the impact you create in the community.
- **Manage the Local Organization calendar**
As a center of organization and communication, you are well-placed to ensure there are no scheduling conflicts between projects, meetings and events within the organization. Keep in contact with all committee chairpersons, Vice Presidents and work with those in charge of the website to keep it up-to-date with the time and date of all scheduled activities.
- **Assist with Local Organization communications**
Be sure to work with those in charge of communications to send out reminder e-mails and notifications prior to big events and meetings. Depending on the size of your organization, you may need to take the lead on internal and/or external communications, including sending membership newsletters, writing and sending press releases or
 - designing fliers.
 - **Provide administrative support**
Be available to the entire Board of Directors, especially the Vice Presidents, to assist with preparing and printing documents. This could include certificates, packets of information, fliers and proposals. The Local Secretary should use clear and concise writing skills with correct grammar to help prepare letters and thank-you notes. Look for opportunities to send notes of courtesy or other correspondence, as this will build a positive reputation for the organization and reinforce the relationship with stakeholders.
 - **Prepare annual report**
Work with the Board of Directors at the end of the year to compile a record of all initiatives and accomplishments from the past year. This is when your accurate records will be important to documenting the year. Refer to the archive of photos you have gathered to produce an engaging visual report for your stakeholders. Make it available to all members. Work with the Vice President(s) for External Affairs to determine which external stakeholders should receive a copy.



LOCAL ACTION GUIDE

Local Treasurer

Being appointed or elected to the position of Local Treasurer is recognition of your integrity, trustworthiness and loyalty to the organization. This shows a respect for your capabilities to handle sensitive information accurately while showing great attention to detail. This position also recognizes your high level of accountability and sense of responsibility.

As Treasurer, you manage all of the finances of your Local Organization, a nonprofit organization. This role is crucial to the structure of the organization because the Treasurer ensures the transparency and solvency of the organization.

THE NONPROFIT PERSPECTIVE

Managing the finances of your Local Organization, a nonprofit, is a serious responsibility and your actions greatly affect the stability of the organization. While handling this significant responsibility, remember that management of the finances of a nonprofit differs from that of a for-profit. While the main purpose of a for-profit is to make money, the main purpose of a nonprofit is to further its mission. Finances are an integral part of every project or event, but success in a JCI Local Organization is primarily measured by how well it advances the JCI Mission:

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

Keep this Mission in mind when evaluating financial choices and making decisions regarding the budget of the organization. Also keep in mind that nonprofits are seen as models to the community and are often held to a higher standard of accountability, honesty and transparency than for-profit businesses. Handling a Local Organization's finances with utmost integrity is essential for maintaining a positive reputation for JCI.

DUES MANAGEMENT

Flow of Dues Payments

In JCI, members pay dues to their Local Organizations to be affiliated, to access the resources provided there and to have the opportunity to participate in all local initiatives and leadership. In turn, the Local Organization pays dues to the regional or National Organization for affiliation, and the National Organization **pays dues** to JCI for affiliation and the right to use the JCI name and identity. These dues on the international level provide for resources such as JCI Training, JCI events, links to international partners, and all JCI World Headquarters administrative services, such as the JCI website and local tools including this guide.

Local Dues Management

Part of your job is to manage the collection and payment of dues at the local level. Your Local Organization's constitution should outline the cost of affiliation for an individual member in your Local Organization and dues payment procedure, such as frequency of payment or payment plans.

Dues Collection

Learn about the existing timeline for dues collection for your Local Organization. As treasurer, you can suggest improvements to the system as you see fit. When it's time for an individual member to pay dues, issue an invoice in advance of their membership expiration which includes the amount due, the membership period covered by the payment, the accepted payment methods and deadline for payment. After the invoice has been issued, follow up with the member to ensure timely payment. Once the payment is received, provide a receipt of payment. Be available to respond to questions or concerns from the members.

Dues Payment

On a schedule determined by your regional or National Organization, your Local Organization will need to declare its membership and submit its dues payment based on number of members. Contact the appropriate person in your National Organization to find out when the declaration and payment deadline is and the dues amount so you can submit on time. Failing to pay the Local Organization's dues on time can result in suspension of privileges and services to all members in your organization, so be sure to strictly meet all deadlines.



BOOKKEEPING

In addition to dues-related income and expenses, the Local Treasurer is responsible for all bookkeeping tasks, financial records and compliance with local tax and government regulations. Meet with the outgoing Treasurer to get up-to-date with the status of all the accounts. Ensure that the previous year's accounts have been audited by a qualified accountant who has no connections with the Local Organization. Learn about all local laws and tax rules that apply to your organization's nonprofit status.

On a day-to-day basis, manage the following duties:

- Record all income and expenditures
- Record acquisitions, property, fixed assets
- Satisfy accounts payable
- Manage income and outgoing cash flows
- Manage any online systems for collecting money
- Manage collections of other income such as sponsorship payments, event registrations, training registrations, donations
- Issue reimbursements for JCI purchases made with members' personal funds and retain a copy of their purchase receipt
- Offer receipts for all payments received
- Submit any documents and financial/tax reports to government agencies
- Prepare monthly financial statements to the membership and an annual financial statement
- Be involved in budget preparation during creation of plan of action for following year. Estimate your income conservatively and your expenditure liberally
- Produce appropriate finance forms (e.g., project budget plan, request for reimbursement form, officer allowance form, etc.)
- Relate all activity and program discussions to budget allocations in order to prevent overspending
- Maintain an amount of money as a reserve for emergencies or unforeseen costs

SAMPLE OF LOCAL BUDGET CATEGORIES

Revenue (Income)

- Membership dues
- Non-dues revenue
- Advertising (funds from advertisement in your newsletters, website or other media)
- Events registrations
- Donations (funds donated by patrons)
- Grants (from other organizations)
- Interest accrued
- Product sales
- Sponsorship

Expenditure (Expenses)

- Advertising (marketing and recruitment)
- Authorized Travel
- Communications/ Publications
- Conventions and Meetings registration and travel costs
- Insurance
- Officer visits (hosting official officers and visitors)
- Office Supplies
- Programs
- Products
- Public Relations
- Rent (secretariat building rent, if any)
- Staff Salary (payroll for staff, if any)
- Taxes (if any)
- Telephone/Fax/Internet

Local Immediate Past President

After your presidential term of hard work and dedication to your Local Chapter, you have accumulated an incredible amount of knowledge, experience and new skills.

These experiences could make you an easy choice to efficiently run the Local Chapter next year, but as the Immediate Past President, you are no longer the leader. You must allow the opportunity for your successor to acquire the same knowledge, experience and skills you did as Local President.

FROM LEADER TO GUIDE

1. **Advise discreetly:** After finishing your role as Local President, while you are stepping out of the spotlight, you are taking on another crucial role. Be mindful that the new Local President has a lot to learn, so share your advice discreetly but do not impose or take over. It may feel natural for you to step in when challenges arise, but you must let the new Board learn from experience, just as you did.
2. **Mission first:** Just as when you were Local President, you can help ensure all activities are aligned with the JCI Mission by guiding members and giving advice. Use the diplomacy skills you gained as President to suggest ideas, but let others take the lead.
3. **Be a role model:** The new Local President will need your help in serving as a role model for new and existing members. Step in as a mentor to provide advice to new members as they embark on their JCI journey.
4. **Facilitate the transition:** After the new Board of Directors is elected, schedule handover meetings with the old and incoming boards. Guide the transition between officers to ensure continuity. Schedule a separate meeting with the incoming President. Share all documents and ensure the person understands and is ready to continue leading all existing plans including the plan of action, strategic plan and any ongoing initiatives. Ensure the incoming President is registered on the national website (www.usjaycees.org) and is aware of their administrative duties on the local, state, national and international levels.
5. **Assist with protocol and procedure:** Sit next to the new President at local meetings to assist with parliamentary procedure or any other needs.
6. **Respect the new President:** During your guidance, avoid making direct comparisons between the current year and previous years. Each leader will have their own unique style, strengths and goals. It is your job to support and respect them just as they did for you.
7. **Fulfill your responsibilities:** As Immediate Past President, you are still part of the board and have constitutional responsibilities. You are accountable to the current President and must fulfill the duties assigned by them. Be available for strategic planning. Your long-term view of the organization will be vital to that process.

SERVE AS GENERAL LEGAL COUNSEL

In many Local Organizations, the Immediate Past President serves as General Legal Counsel (GLC). The primary duty of the GLC is to ensure that the Local Chapter complies with its Constitution at all times. The Local Constitution is the most important document for a Local Chapter. When faced with disputes or challenges, the Board should turn to the Constitution to guide the members to a resolution. Make sure you are very familiar and comfortable with the Local Constitution so you can confidently monitor all actions.

As GLC, you should also know the National and International JCI Constitutions. It is your responsibility to propose any Constitutional amendments necessary to keep the local rules in alignment. While it's important for the Constitution to remain up to date, decisions to change it should not be taken lightly. Always consider the long-term implications of any rule set. See the Local Constitution Action Guide for more details.

BE A COMMUNITY AMBASSADOR

Relative to your term as Local President, you will now find that you have fewer responsibilities and more time. With your in-depth experience and knowledge of JCI, this additional time allows you to represent JCI in the community. Work closely with the Vice President(s) for External Affairs to feed new external contacts that you make to the appropriate committee for follow-up, such as for partnerships, needs analysis or membership growth.

Community engagement allows you to:

- Learn about other groups active in the community and find possibilities for collaboration or partnership.
- Monitor JCI's profile and reputation externally. An external perspective on your organization is important tool for improvement and evaluation.
- Discover which community needs are perceived as most relevant by the public.
- Find best practices from other organizations and groups.
- Become known to prospective members. The more people you meet, the more people will know and become an advocate for JCI.
- Know your competition. Avoid overlapping events and initiatives that are too similar to existing projects. By knowing what others are doing for the community, you will gain insight into what still needs to be done.
- Be represented in umbrella groups. Investigate if there are any consortiums of nonprofits or young professional organizations in your community. It is important for JCI to be represented in these groups to achieve our goal of being the leading organization of young active citizens.
- Form a relationship with your local chamber of commerce and local municipality. Your community leaders represent resources for community needs analysis and alliances you can leverage during your project actions.

LOOKING TO THE FUTURE

This role is not a step back but a step forward in your JCI career. At this point, your opportunities are endless. You can use this year as a time to explore the possibilities of national or international leadership in JCI. Your role as a community ambassador will allow you to see all the opportunities to continue helping your community and representing JCI even after your JCI career comes to an end. But even after you've graduated from a Local Board of Directors role, you can also choose to return to work on local projects and committees to stay directly involved with the community improvement your Local Chapter creates. Continue to use what you've learned as you create positive change in new ways.

Local Board of Directors

Being elected to the Local Board of Directors is both an honor and a responsibility. You represent your fellow members and the interests of the organization in every decision. You must understand your fellow members' motivations and needs and earn their respect.

Your first priority is the members. Make sure you are in touch with the members through constant communication in and out of meetings. They should feel comfortable to contact you about any problem, question or concern regarding the organization. Respecting their opinions, solving their problems and leading with honesty and integrity will earn their trust and confidence.

LEADERSHIP

Authority of the Local Board of Directors

A Board of Directors consists of officers elected by the members and given the authority to make decisions on their behalf. They lead and provide day-to-day oversight of the organization.

However, the Board of Directors does not rule the organization. Ultimate authority remains in the hands of the membership in the form of a National Board of Directors, who vote on the plan of action, the budget and constitutional amendments. All other decisions are delegated to the chapter's Board of Directors, including approval of all projects and activities. The Board bases their decisions on those documents that have been approved by the membership, as well as the JCI Mission and general capacity of the organization. The Board ensures all activities are aligned with the JCI Mission and are in the best interests of the organization. Board members are legally responsible for the decisions they make, and can be overridden by the General Assembly.

Leading By Example

You are a role model for your members, so you must embody the JCI Mission in your actions and attitude. Your positive example will earn their respect for you as a leader. Your active dedication and hard work will inspire your members to do the same.

You also represent your members to other Local Chapters in your area. Ensure that the image you project reflects positively on the JCI name. Even outside of JCI activities, you still represent JCI, so be mindful of your choices in an external setting.

Leading Efficiently

The number of members on the Board of Directors must represent an appropriate percentage of the total membership to serve efficiently. The Board must pay attention to the organizational structure and suggest constitutional amendments accordingly. See the Administrative Structure Action Guide for more information.

The decisions of the Board must also enhance the efficiency of the organization as a whole. When considering activities, consider the scope, resources required, and the capacity of your organization. Ensure all members empowered to participate, but avoid committing to initiatives that are not realistic for the organization to accomplish. Be familiar with all the resources available at www.usjaycees.org and www.jci.cc to maximize your members' potential.

RESPONSIBILITIES

1. Ensure all activities are aligned to the JCI Mission

The purpose of every JCI Local Chapter is to provide development opportunities that empower young people to create positive change. You are the gatekeepers that every proposal must pass, and you must ensure every activity advances the JCI Mission.

2. Ensure organized administration

The Board is responsible for the administrative duties of the Local Organization, which includes collecting and paying dues on time, meeting all deadlines, locally, nationally and internationally, submitting reports as required and adhering to all constitutional rules.

3. Ensure effective management

The Board of Directors must understand the big picture of the organization and where it's going. Effective management includes implementing all local, national and international strategies, ensuring the long-term growth of the membership and verifying financial solvency. Management also includes delegating tasks appropriately and engaging all members. See the Membership Involvement Action Guide for more details.

4. Uphold JCI identity and brand standards

Your Local Chapter is part of a global network and a global brand. We must all participate to ensure the strength and consistency of our global identity. Use the Corporate Identity Guidelines at www.usjaycees.org to ensure your local materials follow the national brand and messaging.

5. Guarantee transparency and accountability

Your Local Chapter should be registered with the IRS and your Sec. of State's office as a nonprofit organization, and the Board members bear the legal duty to follow the standards of this legal status and ensure the financial integrity of the organization. Make all financial reports available to the membership and ensure the budget is tied to the strategic plan.

6. Grow the organization

Part of managing the Chapter is ensuring the long-term stability and growth of the membership. The impact we can create in the world is limited only by the number of young active citizens who participate in this organization. To create more positive change, we must empower more young people. JCI Local Chapters must therefore continue to share JCI with young active citizens so they can take advantage of the opportunities to create positive change in their communities.

7. Cultivate respect and integrity

As the leaders of your Local Chapter, you set the expectations for acceptable behavior. Maintaining an organizational culture of respect, honesty, diversity of thought, peaceful and amicable discussion and solution-oriented thinking will set the tone for all actions and decisions. Throughout the world, JCI prides itself on its diversity and its values of brotherhood, service, justice and personality. The Board of Directors carries on this legacy through its leadership.

PLANNING

Plan of Action

Strong planning is the key to accomplishing goals. A plan of action outlines objectives and actions to fulfill the Mission. The outgoing Local President and Local

Secretary prepare a draft of the plan of action for the next year. They must refer to the national Plan of Action to ensure the local plan is aligned. The local Board makes any changes before sending it to the state association. After elections, the incoming Board incorporates changes approved by the General Assembly and distributes it to all members. At the beginning of their term in office, each officer prepares an individual implementation plan. Refer to the Local Plan of Action Guide for more detailed information.

Continuity through Strategic Planning

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

Every three to five years, the Board can appoint a Strategic Planning Committee to discuss the Local Organization's future and recommend long-range plans to the Board of Directors. Use the USJC national strategic plan to ensure alignment. After the plan is approved, the Board is responsible for adherence to the strategy. Refer to the Local Strategic Planning Action Guide for more detailed information.

Evaluation

Throughout the Board of Directors' term, they must constantly evaluate the performance of the organization and make adjustments accordingly.

Policy: Are the policies of the Local chapter relevant and current? Do all members understand and adhere to those policies?

Financial: Is the budget tied to the strategic plan? Is the budget monitored routinely by the Board and general membership?

Organizational: How successful has the Local chapter been in implementing the strategic plan? How successful are your projects at creating measurable positive change in the community?

Community: Does the community benefit from the presence of your Local Chapter? Has the community seen an increase in sustainability, prosperity, equality, health and well being as a result of your actions? Has a community needs analysis been conducted recently? See the JCI Active Citizen Framework (in Action Guide 1-The Member) for more information.



LOCAL ACTION GUIDE

Project Chairperson/ Local Director

The purpose of JCI is to create positive change in communities throughout the world. Positive change only happens when concrete actions are taken. JCI is a grassroots organization where every action we stand for takes place at the local level.

You are where this concrete action begins. The results that you and your committee produce will determine the success of JCI as a whole. While your project may seem small, always remember there are thousands of other young active citizens like you leading initiatives through JCI to improve the world. Collectively, though your local actions, we can create a better future for all.

PROJECT PLANNING

As a local director or chairperson, you have been selected to be in charge of a certain area of activity within the Local Organization. You will be reporting directly to a Local Vice President, depending on the area of activity to which you are assigned. A Vice President is either in charge of internal activities, which primarily serve and affect the members on a local, national or international level, or they are in charge of external activities, which primarily serve or engage external stakeholders. Examples of activities assigned to a Vice President for Internal Affairs include membership development, internal communications, JCI Events and JCI Training. Examples of activities assigned to a Vice President for External Affairs include community needs analysis, community projects, partnerships, external communications and JCI partner programs.

Why Plan?

Now that you have accepted your assignment, begin planning your project or activity. Every activity must be aligned with the local plan of action and strategic plan. Be familiar with these Local Organization documents to ensure the activities under your responsibility serve to advance the primary goals of the organization. To be effective, every activity, no matter how simple, needs its own specific plan. Only by planning can you prioritize resources and foresee challenges.

Draft Your Plan

If your project involves an ongoing activity with the organization, meet with the prior director to learn about past activities and any existing plan. Ask for their evaluation of past activities and any recommendations as you move forward. As you work through the existing plan and make adjustments, consider transferring the existing plan to the online project planning system.

If your assignment is new, work with your assigned Vice President to outline your scope of responsibility and goals. When you begin planning your specific activities, use the online project planning system, which will provide step-by-step guide for organizing any event.

Online Tools

The online project planning system found at www.jci.cc provides many convenient tools and features for organizing your project, including online access for the committee members you assign, step-by-step planning and budgeting assistance and a partnership management section. The project planning system will also allow you to submit the plan electronically for local board of directors' approval and when finished, one-step posting to the local, national and international project galleries.

You may be assigned to an area of activity that does not involve events or meetings, such as communications or promotions. In that case, access other JCI action guides and manuals in the downloads section of www.jci.cc to assist you with your planning.

BUILDING A COMMITTEE

Based on the plan, you will have an idea of the number of committee members needed to successfully complete the activity.

Identify people within the organization who have shown interest or passion for the topic in the past. Their intrinsic motivation will lead to a more motivated committee. Consider ways to engage the individuals you have identified. You



may bring a sign-up sheet to a general membership meeting where members can indicate interest. Communicate with your Vice President to find out if there are any members they would like to assign or suggest for the committee. Then, follow up with those who have indicated interest or have been recommended so you can gauge their interest, availability and skills. Invite them to work with you on the committee.

Also, think about individuals, organizations, businesses or other stakeholders outside JCI who are interested in the topic. For young people who are not members, inviting them to join your committee may be a good way to introduce them to JCI. You may want to involve potential partners or stakeholders at an early stage so they feel invested in the process and more committed to seeing the activity succeed.

COMMITTEE MEETINGS

The First Meeting

Plan your first committee meeting shortly after the committee is formed to maintain the excitement and interest you have generated. Look for a time and location that is convenient for everyone. While committee meetings don't necessarily have to follow Robert's Rules of Order, it is important to prepare an agenda before every meeting to define the scope of the meeting and keep the discussion focused.

Email an invitation to the meeting with the time, date, location and agenda. Send a reminder email the day before the meeting.

At the first meeting, establish how frequently the committee needs to meet to achieve its goals. Think realistically about the amount of time needed for meetings. Consider schedule of key members and evaluate the time and location of the meeting to see if it will be convenient in the future. Schedule future meetings far in advance so committee members can make it a priority. Stick to the time allotted for each meeting. Refer to Planning Meetings and Chairing Meetings Action Guides for more information.

Present the idea of the project plan to the committee and discuss potential action steps. Ask for their feedback and suggestions about how to improve the plan. Engage everyone from the very beginning. As you make the first complete draft, confirm the commitment of each committee member to a certain area of responsibility for the project.

Obtain Approval of Plan

Submit the plan to your Local Board of Directors for approval. If you are using the online project management system, you will be able to do this electronically.

Moving Forward

After obtaining approval from the Board, meet with your committee to get to work. Delegate tasks according to personal strengths and interests. Give specific assignments with deadlines that you can follow up on. Don't leave a task unassigned or without a deadline. Keep committee meetings concise and on task. Allow for adequate discussion, but stay on agenda and reiterate decision once a certain action or decision has come to the forefront to confirm agreement.

LEADING WITH MOTIVATION

Managing the Progress

Maintain close communications with committee. Supervise group members, and be ready to help when difficulties arise. Recognize the workload of each person. Evaluate progress and hold each person accountable for what they are responsible for at every meeting. If they miss the meeting, follow up by email or phone to keep the project moving forward.

Resolving Conflict

In any group situation, conflicts may arise. Be prepared to mediate and settle differences of opinion diplomatically. Watch for people who say they will do something and don't follow through, as this can bring down the morale of the committee. If there is a committee member with persisting problems, talk to that person in private. Look for the root of the problem and work with them to decide if they need to be assigned to a different task, leave the group or another effective solution.

Building a Positive Attitude

Maintain an upbeat attitude and encourage teamwork and cooperation. Make sure the committee is aware of the current progress of the project, highlighting successes along the way. This will maintain forward momentum and motivate committee members to continue their commitment. Always praise in public and criticize in private to ensure positive group morale.

As the project Director/Chairperson, you set the example and the tone for the committee. Make decisions in the best interest of the project and the committee will follow your lead.

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.



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"