

## **Chapter Capacity Matrices**

The Capacity Matrices have been developed to assist you in the identification of the strengths of your chapter as well as the areas for improvement. They offer a standard for evaluation that you can carry out at the chapter level and should be consulted during year planning. It should also be a commitment of all chapters to move up in capacity year by year, achieving small successes until you reach excellence!

The matrices take four chapter “snapshots”, of chapters at different levels of capacity and performance in the particular area. The Capacity Matrices **aren’t** a prescription for the only way to build the capacity of your chapter or a ranking system to compare chapters with each other. They are for self evaluation and progress tracking.

### **The snapshots are categorized into four capacities:**

#### **Ah! Capacity:**

Items listed here indicate severe areas of weakness for you chapter, improving chapter capacities in this area should be a high priority.

#### **Minimum Capacity**

This is the minimum capacity level or a beginners snapshot, bigger opportunities for impact could be created by improving capacities in this area.

#### **Medium Capacity:**

Your chapter has developed pretty good capacity in this area; you’re a small step away from excellence and greater impact.

#### **High Capacity:**

Operating at this level indicates a very strong area of strength for your chapter, you are meeting the highest standards in this area and you are pushing the envelope of what is possible.

### **How to use the Capacity Matrices:**

The Capacity Matrices are broken down into the following: **Key Programs, Key Functions** and **Key Enablers**.

**Step 1:** Take a look at the Key Program, Key Function, and Key Enabler matrices below. You’ll see that they are broken down into a number of indicators (ex. turnout, quality, name, etc.). ***Rate your chapter’s capacity from 1 to 4*** (“Ah! Capacity” to “High Capacity”) ***for each of these specific indicators*** by marking the current date in the box you think fits best.

Chapter Capacity Big Picture View					
	Area	Capacity (1-4)			
		May 1st:	Date:	Date:	Date:
Key Programs	School Outreach				
	Public Outreach and Advocacy				
	PO&A: Fair Trade University				
	Junior Fellowship				
	Curriculum Enhancement				
Key Functions	Member Learning				
	ML: Learning Partnerships				
	Finance				
	Fundraising				
	Fundraising: Working Partnership				
Key Enablers	Chapter Culture				
	Chapter Health				
	Communications				
	Year Plan				
	Information Technology				
	Executive Health				
	National Community				

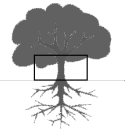
**Step 2:** All the indicators taken together can be used to analyze the overall strength of your chapter in that Key Program or Function on the particular date. However, it's your call on how to weight each individual indicator in its contribution to your chapter's overall capacity in the Key Program or Function. ***Based on the specific indicator ranking fill out the "Chapter Capacity Big Picture View" table above with an overall ranking in each area.***

**Step 3:** Repeat this process several times throughout the year to track your progress.

## Chapter Capacity Matrices – Quick Overview

The Capacity Matrices are a tool you can use to:

- Evaluate your chapter's capacity and identify where you can improve

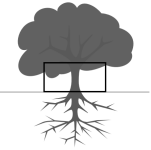


- Map out how progress and small victories can be made in your Key Programs or Functions (by looking at the indicators)
- Track improvements throughout the year by revisiting the matrices

4 The Essentials: Key Enablers

Key Programs: School Outreach

Level	Capacity				
	Ah! Capacity	Minimum Capacity	Medium Capacity	High Capacity	
	1	2	3	4	
<b>School Outreach</b>	<b>Presenters</b>	There is no structure in place to attract and train presenters and ensure quality workshops. You do all of the workshops yourself.	Your chapter has difficulty recruiting presenters. You do most of the workshops yourself.	Presenters are recruited and some training is done to get them ready to deliver quality presentations. You fill in if volunteers cancel at the last minute.	A deliberate structure is in place to attract and train presenters. You do presentations because you want to, not due to lack of volunteers.
	<b>Quantity</b>	Your chapter presents to less than 15 presentations in a year, reaching less than 500 students through SO workshops.	Your chapter does 15-30 presentations in a year, plus a few through the summer. Overall, your chapter engages 500-1000 students in a year through SO workshops.	Your chapter presents to 30-50 classes starting early in the fall and going throughout the school year. You have some presentations in the summer, and reach 1000-2000 students in total.	Your chapter does over 50 classes starting first thing in September and continuing throughout the summer. You reach over 2000 students through SO workshops, and try creative, impact-focused ways of reaching more students.
	<b>Quality</b>	Your chapter's presentations are lacking in quality – kids are disengaged throughout the workshop, and neither their attitudes nor behaviors change as a result of the workshop.	Your chapter's presentations are good quality – most kids are engaged and enjoy the workshop.	Your chapter's presentations are solid - kids can relate to the concepts, have fun, and leave the workshop talking about it and feeling like they can make a difference.	All of your workshops are of the highest quality - engaging, fun, incorporate local context and make connections between kids' lives and ID. Your chapter also engages kids in other innovative, impact-focused ways. Students identify actions they will take as a result of the workshop. Global citizens are born!
	<b>Reputation</b>	Teachers don't ask for repeat presentations. The SO program is isolated from the rest of the chapter, and isn't considered to be a high impact program.	Teachers give positive reviews, and may ask you to do another presentation next year.	Teachers offer their praise, and ask you to come back. They also offer their colleagues' contact info.	Teachers ask you to come back more than once, and rave about you to their coworkers. The SO program is thought of as an integral part of your chapter's impact.
	<b>M&amp;E</b>	There is no feedback process for the SO program.	Your chapter collects feedback from presenters and incorporates that into future presentations in some way. CHAMP is up to date with all of the SO activities at your chapter.	Your chapter collects feedback from teachers using the online survey, and presenters share feedback. Your volunteers learn from the feedback, striving to improve quality. CHAMP is up to date with the SO activities.	You collect feedback from teachers, presenters, AND students, and work to continually improve the workshops and your facilitation skills. CHAMP is up to date with all of the SO activities at your chapter.

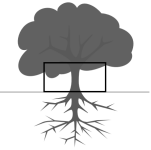


Key Programs: Public Outreach and Advocacy & Fair Trade University

Level	Ah! Capacity		Minimum Capacity		Medium Capacity		High Capacity	
	1		2		3		4	
<b>Public Outreach and Advocacy</b>	Scale	Combining levels 1, 2 and 3 of engagement, you reach 1 000 people	Combining levels 1, 2 and 3 of engagement, you reach 2000 people	Combining levels 1, 2 and 3 of engagement, you reach 7000 people	Combining levels 1, 2 and 3 of engagement, you reach 15 000 people			
	Change Rate	Definition of Change Rate: the percentage of people you reach that actually change an attitude or behaviour. Your chapter doesn't consider what attitude or behaviour change you want to occur in a person you're engaging.	You sometimes consider "change rate" in your activities and might choose location based on this (i.e. If you want people to form the habit of buying Fair Trade, you do outreach directly at the bananas at the grocery store)	You use "change rate" to decide between different potential activities (in addition of course to <i>scale</i> and <i>resource use</i> factors)	When you're aiming for a high change rate, you hit it. You make taking action very easy. You positively reinforce people, and create situations where people take public commitments. For these activities, you estimate that over 50% of people you engage change.			
	Resource Use	Your chapter spends many hours planning an activity that has little impact when you could have spent 0 hours planning to go to the cafeteria to talk to people about Fair Trade.	You've tried guerrilla and repeat outreach events or other ideas to effectively use resources.	You significantly reduce the amount of public outreach time that goes into planning by doing a lot of guerrilla and repeat outreach events. You still have good goals and approach.	You use resources excellently by doing a lot of guerrilla and repeat public outreach. This reduced planning doesn't come at the expense of superb goals and approach. When you do a lot of planning, you see big payoff in impact.			
	Execution	Volunteers don't try to figure out effective approach during an event.	Volunteers are creative in their public outreach approach during an event and try different things (i.e. Asking if a person has heard of Fair Trade vs. telling them to buy Fair Trade)	Volunteers often try different approaches during an event and share their approach real time with other volunteers.	Your chapter has a culture of striving to figure out how to engage people best. They bring creative approaches. Volunteers meet after to share lessons learned and incorporate into future planning.			
	Volunteers	You have few and unprepared outreach volunteers to draw on.	You have a small outreach volunteer base to work with, and most can talk their way through an issue well.	You have 20 volunteers you can draw on. They're a good balance of new and old outreach volunteers. They're well-versed and motivated to get out there and create some change.	You have 40 new or experienced members that will volunteer at some point. With the help of member learning being integrated with public outreach, they know their stuff. They're pumped.			
	Cross-Canada	You never participate in cross-Canada public outreach or advocacy events, like Reverse Trick or Treating, a campaign to meet MPs, or EWB Day.	Your chapter contributes to most cross-Canada events.	Your chapter contributes to most cross-Canada events. If appropriate, you adapt them with originality to your specific context.	Your chapter makes a disproportionately high contribution to cross-Canada events, and shares lessons learned widely.			

## 6 The Essentials: Key Enablers

	Advocacy	You don't have relationships with any MPs in your city.	You have relationships with 25% of the MPs in your city	You have relationships with 75% of the MPs in your city and you're in contact with them multiple times in a year.	You have relationships with 100% of your city's MPs, you meet with them multiple times in a year, and you can demonstrate that they've changed as a result of your relationship.
Fair Trade University	Resources	Making your university a Fair Trade University is just one of many responsibilities of an existing exec member (like the public outreach and advocacy rep).	You have a director (or equivalent) driving this forward with plans to dedicate more resources soon.	You are dedicating resources to making this happen. You have an exec member (or equivalent) driving this. You have a plan for transferring the many crucial external relationships year to year.	Your past president (or someone equally kick butt) is driving this forward, leading a team of contributors. You have a multi-year plan that will flawlessly continue when your leader graduates.
Fair Trade University	Relationships	You haven't considered who might be a key actor, and you don't have relationships with anyone that might be key.	You've done some identification of who the key actors are. You have some relevant relationships.	You have done an analysis of who is a key actor in the process, and have built relationships with some of them.	You've identified all the key people relevant to the university adopting a Fair Trade policy, their specific contribution, interests, and how they influence each other. Your chapter has strong relationships with all of them.
Fair Trade University	Visibility of Fair Trade	Fair Trade is never promoted on campus. Most students are likely to never even heard of it before.	A student at your university is likely to see you or another group promoting Fair Trade at least once per semester.	A student at your university is likely to see you or another group promoting Fair Trade at least once per month. Most Fair Trade outlets and the products themselves have good signs about Fair Trade.	A student at your university is likely to see you or another group promoting Fair Trade at least once per week. Most Fair Trade outlets and the products themselves have signs about Fair Trade that even the most hung over 1 <sup>st</sup> year student couldn't miss at 8am.
Fair Trade University	Availability	10% of food outlets, university internal meetings and events carry at least one Fair Trade product	20% of food outlets, university internal meetings and events carry at least one Fair Trade product	60% of food outlets, university internal meetings and events carry at least one Fair Trade product	100% of food outlets, university internal meetings and events carry at least one Fair Trade product
Fair Trade University	Fair Trade Policy	You don't know what a Fair Trade policy or a Fair Trade University Steering Group means.	You know what a good Fair Trade Policy and Fair Trade University Steering Group might look like.	You've initiated the process of making a Fair Trade Policy and started identifying who would be on a Fair Trade University Steering Group.	Your university has passed a Fair Trade policy and has a Fair Trade University Steering Group that is sustainable.
Fair Trade University	Outcomes	Your university has 0% achieved the goals of a Fair Trade University.	Your university has 20% achieved the goals of a Fair Trade University.	Your university has 60% achieved the goals of a Fair Trade University.	Your university has 100% achieved the goals of a Fair Trade University, and therefore have become a genuine Fair Trade University – see the “Fair Trade University Guide” on <a href="http://chapters.ewb.ca">chapters.ewb.ca</a> for the goals.



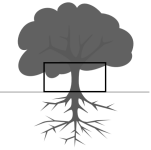
Key Programs: Junior Fellowship

Level	Ah! Capacity		Minimum Capacity		Medium Capacity		High Capacity	
	1		2		3		4	
<b>Junior Fellowship</b>	Esteem	The Junior Fellowship program is virtually unheard of around the university, or even has a bad reputation.	The JF program is known to many engineering students, but only on a very broad level.	The JF program is known about and held in esteem by most engineering students, and to some extent outside of the engineering faculty.	At your university the Junior Fellowship program is held in high esteem as a competitive and valuable opportunity.			
	Applications	Your chapter has serious difficulty preparing or attracting quality JF candidates. Also, the quantity of applicants is barely more than the number of positions available.	Your chapter gets slightly more super high quality candidates than positions available.	Your chapter ensures that there are 3-5 super high quality applicants for each JF selected. These candidates are some of the strongest leaders and thinkers on campus.	Your chapter works hard through member education, advertising and JF orientations to ensure there are 5-10 super high quality applicants for each JF selected. These candidates are the best all around leaders and thinkers on campus.			
	Communication	While overseas, your JFs go AWOL for 4 months, without proactive efforts at communication from either the JFs or the chapter in Canada.	Your JFs communicate back to the chapter from time to time, sharing some insights into their experiences.	Your chapter stays in good communication with your JFs, who share thoughtful stories and lessons learned. They bring these stories and experiences back to the chapter upon return.	While overseas, your chapter stays in close communication with your JFs, who share stories and lessons learned with all your members back in Canada. Members follow the experiences of your JFs, thinking about how they'd like to do a placement. The lessons and experiences continue to be shared with the chapter during the school year.			
	Involve (pre)	Without active encouragement from the chapter, your selected slack off, waiting for May to roll around, where they get blindsided at pre-dep training. Also, the chapter gets frustrated with the lack of involvement of their JFs in the chapter.	Through the encouragement of your chapter and through prior expectation setting, your JFs take on roles within the chapter after their selection and do their online learning modules.	Through the encouragement of your chapter and through prior expectation setting, your JFs take on significant roles within the chapter, do their online learning modules, and take learning into their own hands.	Your JFs take on a solid role in the chapter in the year in which they are selected. Your JFs take preparation for the placement very seriously. They complete all the online modules, direct their own further learning, and past OVs actively coach them.			
	Contribution (post)	Your JFs don't come back from their placements, or come back but lay really low.	Upon return, your JFs take on formal or informal leadership roles and have the opportunity to do a number of presentations related to their placements. They play in a minor role to improve the development knowledge and connection to overseas.	Upon return, your JFs take on significant leadership roles and have the opportunity to do quite a few presentations on their placements. The JF plays a key role in building knowledge of development and EWB's work overseas. The JF is proactive in recognizing the chapter's needs which they can fulfill. The chapter actively engages the JF and quickly assesses what value they can add. Chapter members use the JF for chapter goals on a regular basis.	Upon return, your JFs take on central leadership roles in the chapter and have many opportunities to do presentations and outreach. The chapter knows what the JF can offer and how that matches with what the chapter needs. Specific strategic areas are targeted and worked on. The JF in turn does an excellent job in contributing to the chapter in a variety of areas namely development knowledge, connection to overseas and overall leadership.			
	Contribution overseas	The JF did not add anything to the partner. The partner was not happy with the performance of the JF and would not like another one in the future. The JF was detrimental to the EWB team. They were a drain on the JF team and took resources away from other more high impact areas.	JF added very small amounts of value to the partner. They took up some of the partner's resources which could have gone into other areas. The JF made minimal contributions to the EWB overseas team. They were an active member of the JF team.	The JF added value to the partner in one area. The partner is happy with the JF contribution and would like another in the future. The JF played their role within the sector team and EWB and contributed as desired. They were a positive contributor within the JF team.	Partner was very excited with the role the JF played. Positive change occurred for the partner in a small number of areas that will be sustainable. The overseas team saw a benefit in the JF and they contributed to the learning of EWB and the goals of the sector team. They helped their other JFs achieve more through thought leadership and role modelling.			

## 8 The Essentials: Key Enablers

### Key Programs: Curriculum Enhancement

Level	Ah! Capacity		Minimum Capacity		Medium Capacity		High Capacity	
	1		2		3		4	
<b>Curriculum Enhancement</b>	<b>Team</b>	Your chapter has very few members with an interest or capacity to work in curriculum enhancement, and therefore can't really devote a sustained effort to any curriculum initiative.	Your chapter has a couple people who can guest lecture in courses about global engineering concepts, and they are responsible for curriculum initiatives in addition to other responsibilities. These people have an understanding of Global Engineering concepts.	Your chapter has one committed and capable CE champion whose purpose on the exec team is to lead the chapter's curriculum work. Other members help with initiatives when needed. The chapter has an understanding of Global Engineering concepts.	Your chapter has a CE exec member and a dedicated group of CE volunteers who's primary responsibility is to work on the chapter's CE initiatives. The CE leaders have in depth knowledge of global engineering concepts and are actively involved in the program nationally.			
	<b>Faculty</b>	Your chapter has minimal relationships with the faculty at your university. There is no opportunity for you to influence curriculum, and there is a good chance of the material becoming inappropriate, which could promote the wrong messages and reflect badly on your chapter and EWB.	Your chapter has a good relationship with a few professors. There is some opportunity for your chapter to work with these professors and influence the curriculum, however there is no long-term commitment for continuing initiatives, and the professors see them very much as a secondary projects.	You have a trusting relationship with many professors and are able to influence curriculum design. The professors are proud of the partnerships, showcase them, and plan to run them for several years. They exhibit a strong understanding of Global Engineering concepts. One is a champion engaged in national CE initiatives.	You have a trusting relationship with professors and the faculty administration. The dean is proud of your work and showcases it to other universities. The administration wants to formalize many of the initiatives and replicate them in other courses. Many faculty are Global Engineers and are engaged in national CE initiatives.			
	<b>M&amp;E</b>	No evaluations or follow up work is done with your chapter's curriculum enhancement initiatives to gauge their success or gather feedback.	The members of your chapter involved in curriculum enhancement reflect on and discuss the activities, and capture some lessons learned.	At the end of course, you reflect on and evaluate your impact by measuring the KSAs of the students and, with feedback from the course instructor, adjust the program to maximize learning.	You reflect on and measure the KSAs of the students at the start & end of the initiative and collect instructor feedback. You adjust the program and share what you learn with other chapters.			
	<b>Impact</b>	Your chapter's curriculum enhancement initiatives do not result in any change in attitude for participants or result in a negative attitude towards EWB and/or the concept of global engineering.	Students come away with a basic understanding of their role as a Global Engineer, and an interest in EWB.	Students come away knowledgeable of their role as a Global Engineer and have some basic knowledge and skills to help facilitate a more globally responsible approach to engineering. A few of them get involved in EWB.	Students come away with a deep understanding of Global Engineering principles and demonstrate the KSA of global engineers. They use this capacity in other course work, job choices and further learning on the concepts.			
	<b>Depth</b>	Your chapter delivers one-off guest lectures in classes briefly introducing EWB and our approach to development.	Your chapter delivers recurring lectures or an interactive workshop within a class that may include out-of-class reading or an assignment.	Your chapter is in charge of a key component of a course, such as the course project or the course tutorials.	Your chapter is involved in all aspects of the course curriculum, working and advising the course professor on course content and delivery.			
	<b>Planning</b>	Your chapter is reactive to opportunities to be involved in courses on campus and does not actively seek them out.	Your chapter actively seeks opportunities to involved themselves in courses through faculty champions in an informal and ad-hoc manner.	Your chapter writes proposals for potential curriculum initiatives for the year and presents them to faculty members and administration.	Your chapter has a multi-year curriculum enhancement plans developed with faculty champions which it follows to work out what the priorities for the chapter are for the year.			

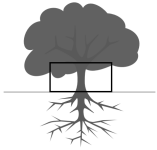


Key Functions: Member Learning (University Chapters) & Learning Partnership

Level		Ah! Capacity	Minimum Capacity	Medium Capacity	High Capacity	
		1	2	3	4	
<b>Member Learning</b>	Quantity	Freq.	Your chapter runs learning sessions sporadically, averaging out to less than one per month.	Your chapter holds learning sessions at a consistent time, every 2 weeks.	Your chapter holds consistent weekly learning sessions.	Your chapter holds consistent weekly learning sessions, in addition to other learning activities, such as discussions groups.
		Turnout	Chapter members don't prioritize member learning sessions. Turnout is very low, often less than 5 people.	Your chapter's learning sessions draw 10+ members, and new people come from time to time.	Members consider learning sessions to be a core part of the chapter. Attendance of 20+, both members and new people, is common.	Members book ML sessions off as EWB time. New people also come out, and you regularly pull out large and diverse crowds (30+ members).
	Quality	Format	Your sessions pretty much all follow the same structure. It's clear participants are looking for more diversity.	Your chapter's learning sessions mostly follow one format, but a few times a term a different session structure is used.	A mix of EWB workshop, chapter-created workshops, OV presentations, guest speakers, games are used to facilitate learning at your chapter.	Your chapter draws on diverse sources for a variety of session formats. Audience, topic, and time of year are taken into consideration when planning session formats.
		Facilitation	Your chapter's learning sessions are cliquey, poorly facilitated and frustrating, use only one learning style and go late. All sessions are facilitated by the same person.	Your gatherings are fun but may come across as being a bit exclusive, rely heavily on one learning style, or often go over time. One person facilitates the majority of sessions.	Your sessions are inclusive and fun. Different learning styles are used and a variety of people facilitate workshops. Sessions have solid structure and usually end on time.	Your gatherings are inclusive, participatory and fun, appeal to different learning styles (visual, auditory, kinesthetic), remain structured and end on time.
		Topics	Sessions cover a narrow range of topics, perhaps based on one person's personal interests rather than the chapter's and members' learning priorities.	Your chapter's sessions cover a couple of different learning areas. A few people may have been involved with choosing the topics.	A variety of topics are explored in your chapter's learning program, likely identified using a participatory process.	A diverse range of learning topics are covered. Members' learning wants and needs are balanced appropriately for your chapter.
	Overseas connection	Development knowledge is low, and your chapter does not have a Learning Partner. Members at your chapter do not feel connected to EWB's overseas programs or Dorothy.	Members have basic development knowledge. A few members may feel connected to overseas. Your LP and JF are occasionally used as learning resources.	Members feel connected to overseas – EWB's volunteers, Dorothy – and have a solid understanding of development. You often use your LP and JF to achieve this.	Members can talk easily about EWB's overseas work, and feel connected to Dorothy. Your LP and JF are integrated into the learning program.	

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<b>Learning Partnership</b>	<b>Impact</b>	<b>M&amp;E</b>	Your chapter does not gather feedback or track results.	Feedback is occasionally gathered after a facilitated session. Most learning activities are captured in CHAMP.	You evaluate your chapter's learning program at the end of the year and get facilitator feedback for each session. CHAMP is always up to date.	You have solid processes in place to assess quality of facilitation, progress towards and achievement of learning goals (individual and chapter), program effectiveness, etc.
		<b>Learning champions</b>	Your chapter's workshops don't seem to increase the development and social change thoughtfulness of your members, and aren't inspiring them to direct their own learning.	Through these gatherings you can see that members are getting a better idea of the complexities of development and social change.	Members have a good understanding of the complexity of development & social change issues. Many are directing their own learning outside of chapter sessions.	Your chapter's members have become thoughtful about development and social change, and have developed an insatiable appetite for further learning!
	<b>Chapter performance</b>	Learning is not connected with other chapter goals and activities.	Learning sessions are run in preparation for some chapter events, like EWB day and the National conference.	ML is connected to all your chapter's activities. Members learn the knowledge and skills needed to do effective public & school outreach, advocacy, etc.	Members not only learn the knowledge and skills to do activities more effectively, but also learn from doing those activities, and use those lessons to continually improve.	
	<b>Freq.</b>	You incorporate your Learning Partner into activities 1 or 2 times per year, and doesn't share his/her communication with the entire chapter.	Your chapter incorporates your LP into chapter activities 1-2 times per term, and occasionally shares his/her communication with the entire chapter.	Your chapter incorporates your LP into chapter activities monthly, and frequently shares his/her updates with the entire chapter	Your chapter incorporates your LP into chapter activities several times a month, and regularly shares his/her updates with the entire chapter.	
	<b>Diversity</b>	Members learn from the Learning Partner only through emails.	Members learn from the Learning Partner in 2 ways like email and phone calls.	Members learn from the Learning Partner in 3 ways like email, phone calls, or photos.	Members learn from your LP in many ways like email, phone calls, photos, blogs, workshops, etc)	
	<b>Learning</b>	Your chapter members are not familiar with EWB's work overseas, your Learning Partner, his/her sector, project or community through the partnership.	Some of your chapter members are familiar with EWB's work overseas, your LP, his/her sector, project and community.	Many members know about EWB's work overseas, your LP, his/her sector, project and community through the partnership.	The majority of members have learned about EWB's work overseas, your LP, his/her sector, project and community.	
	<b>Integration</b>	Your Learning Partner is not integrated into your Member Learning program.	Your Learning Partner is occasionally integrated into your Member Learning program and not integrated into any other programs.	Your LP is an important part of your Member Learning program at your chapter, and is occasionally referenced within other programs.	Your LP is an important part of multiple programs at your chapter like Member Learning, Public Outreach, etc.	
	<b>Responsibility</b>	There is very little or no support for the Learning Partnership from your chapter.	There is general support for the Learning Partnership amongst the executive, but not one specific person driving the program.	Executive members are excited about the Learning Partnership, and someone specific has included it in his/her portfolio.	Exec members are very excited about the Learning Partnership. There is a dedicated member responsible for ensuring LP success.	



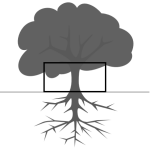
Key Functions: Finance

Level	Ah! Capacity		Minimum Capacity		Medium Capacity		High Capacity	
	1		2		3		4	
<b>Finance</b>	<b>Budget</b>	There is no formal chapter budget. Budgets are thrown together on an ad-hoc basis as they are required for various things.	Your chapter's budget usually comes together sometime in the fall, in time for you first granting proposal. It's rushed and not a lot of thought has gone into it.		You chapter has a well-thought out budget, but only a few people are aware of it.		Your chapter creates a well thought out and visible budget for the year.	
	<b>Reports</b>	You don't submit all your financial reports,	All your financial reports get in, but not all on time, and not all complete.		Your financial reports are complete, but not always on time.		Your financial reports are complete and on time every month.	
	<b>Comm.</b>	Your exec is out of the loop regarding finances.	A portion of your exec is aware of the financial status of your chapter.		Your entire exec has a good idea of the financial status of your chapter, but there isn't a formal and effective way of communicating this regularly.		Your entire executive is aware of your chapter's financial status, and chapter members know what they need/want to know.	
	<b>Cash</b>	Cash is not always in the box, and when it is, it stays there and not in the bank.	Cash is in the box but stays there for too long.		Cash is always in the box, but can sit there for more than a week before being deposited in the bank.		Cash in is cash in the bank.	
	<b>Records</b>	Records are a mess and indiscernible to new VP Finances or anyone else.	Records are adequate. They may be a bit difficult to transition, but it does happen.		Records are clear and make sense.		You keep awesome records that a new VP Finance can jump right.	
	<b>Reqs</b>	Financial requirements of the National Office are poorly understood.	There is some confusion over financial requirements of the National Office.		You're not 100% clear on all the financial requirements of the National Office.		You clearly understand all financial requirements of the National Office.	

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Key Functions: Fundraising & Working Partnership

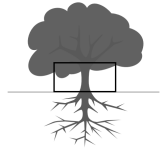
Level	Ah! Capacity		Minimum Capacity		Medium Capacity		High Capacity	
	1		2		3		4	
<b>Fundraising</b>	<b>Goals</b>	Your chapter sets a completely unattainable or non-ambitious fundraising goal, and there is little cooperation or commitment in meeting the goal.	Your chapter sets high goals that seriously risk stretching the chapter thin, or underestimates itself. While there seems to be chapter buy-in to the goal, there isn't a chapter-wide effort in meeting it. You don't have a detailed plan to raise the money.	Your chapter sets reasonable funding goals but could push a bit further (or perhaps you set goals a bit high and unrealistic). Most chapter members are excited about the goal and contribute to fundraising in some way. You know at the start of the school year how you will raise each dollar projected in your goal.	Your chapter sets a lofty fundraising goal and works together to reach the goal early. If appropriate, your fundraising goal this year is higher than it was last year. You take lessons learned from previous years and adjust your goals and prospects for funds appropriately.			
	<b>Sustainability</b>	Your chapter gives little thought to sustainable funding and the fundraising opportunities of future executives.	Your chapter is thinking about the sustainability of various funding approaches, but your funding is still very much year to year. Relationships with donors have to be renewed often.	Your chapter is seeking out and establishing diverse, sustainable funding sources. Relationships with funders transition well from year to year. Donor follow-up and appreciation is perhaps less than excellent.	Your chapter has solid funding that is focused long term and diverse. Future execs can focus on maintaining the relationships you developed. Information and relationships with repeatable funders are well maintained.			
	<b>On time Payments</b>	You are often fundraising like mad in April for JF and WP, and sometimes don't make enough to meet the payments.	You fundraise enough to cover the cost of JF and WP payments, but they come in very late. National Office is on your case.	You fundraise enough for JF and WP and are able to get a cheque to the National Office by April 30th.	You are able to send a cheque for all of your overseas commitments (JF and WP) to the National Office by March 30th.			
	<b>Available Resources</b>	Almost all of your chapter's efforts are focused on fundraising, particularly in the second semester, which drains all the energy and members lose a lot of enthusiasm.	Fundraising is a drain on the chapter and is noticeably having a negative effect on other programs. Not a lot of people are involved in your fundraising... mostly exec.	Fundraising takes priority part way through the second semester, and as a result other programs suffer a bit. You have some non-exec members on your team.	Fundraising does not drain your chapter and detract from important outreach and education goals. You have a diverse fundraising committee with exec and general members. There is a sense of ownership over your fundraising plan.			
	<b>Overseas Impact</b>	Your chapter has difficulty fundraising enough for one JF. Your budget is spent primarily for conference or local costs.	You're able to fundraise enough for your overseas commitment. More than half of your budget is for your overseas commitment.	You're able to fundraise enough for your overseas commitment. Your overseas commitment is a substantial part of your budget.	You have a large portion of your budget committed to overseas. You tie a lot of your fundraising to overseas work.			



<b>Working Partnership</b>	<b>Diversity</b>	You get most of your money from one source like faculty and large events, with few smaller events to make up the difference	You have varied funding, from faculty, societies, student unions, as well as some fundraising from sustainable small events.	Your chapter has weekly events that bring in the dough, and engage new members. You have good relationships with your largest sponsors.	Each week, your chapter participates in a small fundraising event. You also have a diverse base of large donors, like service clubs, faculty, societies, etc.
	<b>Buy-in</b>	There is zero buy-in to the WP program from your chapter.	There is general support for the WP program from chapter members, but there are few people that are passionate about it and driving it forward.	Most chapter members are really into WP. You share your overseas commitment with your audience at events and regularly give updates on their work.	Your whole chapter is stoked about the WP program and you have a dedicated exec member who is focused on making your Partnership a success!
	<b>Fundraising</b>	Your chapter has set a goal that undervalues your capacity to fundraise and/or is not approaching the target you set out. Chapter members do not see the value in fundraising for the WP.	Your chapter has set a goal that reflects your capacity and is on target to reach by the end of the school year. Members don't feel they know about the program and your partner to be comfortable fundraise.	You have set a goal that is challenging and motivating and have effectively integrated WP fundraising into your fundraising plan. Some members are comfortable and prepared to fundraise for your WP.	You have a strong fundraising plan implemented to hit your WP goal that challenges and motivates your chapter. Everyone feels confident fundraising for your Partnership and is proud to directly support EWB's impact overseas!
	<b>Connection</b>	Your chapter does not feel connected to your partner long-term volunteer.	Your chapter reads your partner's updates, but doesn't feel very connected to them or their work.	Your chapter is excited to receive updates from your volunteer, and feels comfortable talking and promoting their work overseas.	Your chapter feels connected to your WP and is comfortable (and excited!) talking to others about their project and EWB's work overseas. Your chapter is proud to be a part of your partner's work!
	<b>Connection</b>				

Key Enablers: Chapter Culture

		Ah! Capacity	Minimum Capacity	Medium Capacity	High Capacity
		1	2	3	4
<b>Chapter Culture</b>	<b>Culture sensitivity</b>	Your chapter has a very laissez-faire attitude. Generally your chapter settles for mediocrity, gets stuck in ruts, sets unambitious goals (or none at all), seriously lacks energy, and chapter activities are a low priority for everyone involved.	Your chapter's core leaders exhibit most of the qualities listed in the high capacity level.	All of your chapter leaders exhibit the qualities listed in the high capacity level. There is a solid "team feeling" in the chapter. Your chapter is actively and consciously working towards bettering its culture and increasing its capacity throughout the year.	Your chapter has an obvious culture of excellence, innovation, ambition, questioning, thoughtfulness, hard work, strategy, constructive feedback and self-improvement, leadership, energy and commitment. Your chapter applies critical thinking, the think-do-reflect cycle, and is impact focused throughout all of its individual initiatives and the year plan. Every one of these qualities is evident in all your chapter's activities, members and culture. There is a solid "team feeling" and sense of community that drives people. Your chapter views its culture as dynamic and consciously work towards cultivating a strong culture throughout the year.
	<b>Promote it</b>	Your chapter does not think about "chapter culture" and is not working to influence it.	Most of your chapter leaders are conscious of chapter culture, and try to promote this culture in their interactions and activities.	Chapter leaders are conscious of chapter culture and some of them work hard to uphold these values and spread the good stuff around.	Your chapter leaders work hard to uphold these values and to spread this culture among new members.
	<b>Monitoring &amp; Evaluation</b>	Your exec views a past initiative as in the past, and moves on, repeating mistakes and not thinking critically about the chapter's impact.	Your exec reviews past events and takes some lessons from them, more on a logistics level. Your chapter views CHAMP as a black box of information you simply input numbers into.	Your exec monitors its initiatives, their impact, and the learnings discovered from them by entering all the information into CHAMP. Your exec reviews past initiatives, starts to look a bit deeper into the impact of them, and takes lessons from them.	Your exec monitors its initiatives, their impact, and the learnings discovered and has incorporated CHAMP to be used as a monitoring and evaluating tool. Your exec does an excellent job of critically assessing past initiatives, celebrating successes, learning for the future, and applying the learnings to the next initiatives. Your exec uses CHAMP as a resource to make this happen.



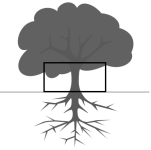
Key Enablers: Chapter Health

Level		Ah! Capacity	Minimum Capacity	Medium Capacity	High Capacity
		1	2	3	4
<b>Chapter Health</b>	Depth	A few select people deliver on all of the chapter's activities. There may be high transition within the executive in a year. Exec and other members fail to meet their commitments, and the people that deliver burn out.	Your exec is good, but few general members make the transition from participating in events to becoming directors or contributing in other ways.	Your chapter has a good group of contributing people beyond the exec. You have a structure that allows for meaningful non-exec roles, and you can think of at least 30 active members beyond the exec.	Your chapter has significant depth beyond the executive. You have a large and committed team of directors or committee members and can think of at least 75 active members beyond the exec.
	Turnover	Your chapter's turnover is a major concern. Turnover is routinely rough and there is little focus on building the next year's team. Learnings from previous years are not applied to the turnover process.	Your chapter thinks pretty hard about turnover, but next year's team still comes together in a sort of ad-hoc way (i.e. not strategic about getting the right people in the right role, and setting up the best structure to meet the chapter goals), and you might be light on new members.	Your chapter's turnover is forefront in many people's minds and you make strong efforts to ensure good transition by focusing on team building for the future, a balance of young and old, using the learnings from previous years, and getting the right people in the right role.	Your chapter has a strategic plan to ensure a successful transition/turnover. The processes are set up to ensure the right people are in the right roles, the organizational structure is designed to enable high performance, and the outgoing exec is set up to loan out their brain and heart to the incoming exec so as to transfer all the key knowledge and learnings from the previous year! The new team is diverse in experience and background, is set up with clear expectations and is ready to strive to lead a year of high impact!
	Faculty	Your chapter's relationship with the faculty is strained or even negative. When they come across EWB, they wonder, "hey do we have an EWB chapter on our campus?"	Your chapter has an acceptable relationship with the faculty.	You have a strong relationship with the faculty and you have a strong relationship a member of the faculty who is amongst the biggest champions of EWB and the cause!	Your faculty loves EWB, jumps at any chance to work together or assist your chapter, and uses EWB as the model student group. You have a strong relationship with a member of the faculty you'd consider your "faculty champion". They act as the chapters, EWB and the causes' biggest champion within the University administration; and are more than excited to support your chapters' operations to run smoothly.
	Personal growth	Your chapter invests little in its members, and you don't see much growth in people as a result of their involvement in the chapter.	Your chapter's leaders grow in skills and leadership ability through trial-by-fire. However, there is little empowerment and focus on the development of members not already in leadership roles.	Your chapter focuses on the development of its leaders and is working to empower its less involved members. You intentionally view every situation, action and responsibility as an opportunity to learn, grow and evolve as a leader.	Your chapter focuses on leadership, skills development, and empowerment of your active members, striving to continually pump out a contingent of Canada's strongest social leaders. Your chapter views personal growth as a parallel process as you work towards achieving your chapters' aspirations
	Sustainability	Your chapter seems like it will dissolve when its current members graduate. New people just aren't interested.	Your chapter, through word-of-mouth and by pulling off good events, attracts a small number of new members.	Your chapter takes a more active approach to attracting new members, and the ranks remain full of good people.	Your chapter actively attracts, engages and retains new members. The whole exec feels ownership over the sustainability of the chapter and is dedicated to getting the key new members engaged and retained.

16 The Essentials: Key Enablers

Key Enablers: Communications

Level	Ah! Capacity		Minimum Capacity		Medium Capacity		High Capacity	
	1		2		3		4	
<b>Communications</b>	Good reputation	Your chapter is a secret club that only EWB members know about. The few people who know about it have doubts about your credibility.	Your chapter is quite well known within the engineering faculty, and has a bit of visibility around the rest of the university. They like what they've seen, and it makes them want to know more.	Your chapter is in the top ranks of most active student groups at your school and has a high profile within the engineering faculty. Most students on campus have heard of EWB and say good things about it.	Your chapter is known as #1 most active student group on campus and the President invites you to her office to smoke cigars. Every single person on campus has respect for EWB and enjoys their interactions with EWB members. You share best practices with other chapters and on myEWB.			
	Targeted audiences	You think only about what you want to say. Your chapter doesn't think about who you're talking to.	Your chapter realizes that communications is a two-way street. You're beginning to identify different audiences, but don't yet have a deep understanding of how they like to communicate or what motivates them.	Your chapter has spent time learning about what motivates your various audiences, and you've developed some targeted messaging for each group. You begin to see better connections, relationships, and trust between your chapter and different audiences.	All your chapter members are master communicators who are able to inspire and establish lasting connections with high school students, faculty, service clubs, the media, and members of the public alike.			
	Focused messaging	You are talking to people about EWB, but your audience is confused about what you're really trying to get at and why you're telling them about EWB.	Your chapter is able to focus on a few key messages by thinking about the audience and the purpose of communicating with them.	Every time you communicate, you think about your audience, the purpose of communicating with them, and focus on getting the right messages across to them clearly.	Your chapter is able to communicate clear messages that target the right audience, and inspire them to answer your call to action in support of EWB's vision. As a result, more people get involved.			
	Storytelling	Stories are for kids.	You've heard some inspiring stories about EWB, and your chapter is beginning to talk about how those kind of stories might help you're your chapter's communications.	Your chapter has a collection of 3-5 good stories to tell about EWB, and you've been sharing these stories with various audiences. You're noticing which stories get the best reactions from each different audience.	Your chapter members have studied what makes a good story, and you've practiced a lot of storytelling together. You find new stories to tell all the time, and you're able to recount them in a way that truly inspires your audiences.			
	Branded comms	Your posters, website, newsletters, T-shirts, and other materials are non-existent, or very basic. You do not use the EWB logo.	Your chapter produces a number of publication materials, and you have the logo on each one.	Your chapter materials are clear, concise, correct, and consistent with other EWB publications. The EWB logo appears prominently.	If you hired the best PR firm in the country, your materials couldn't look more professional.			

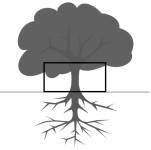


Key Enablers: Year Plan

Level	Ah! Capacity		Minimum Capacity		Medium Capacity		High Capacity	
	1		2		3		4	
<b>Year Plan</b>	<b>Ownership</b>	You don't have a year plan, or it was created and never used. It's not very readable or useful. The year plan was created by only a few members, but not all the core exec. The document is seen as a static document.	A year plan was created with input from the entire executive. Some execs might not feel like they have ownership over it, and don't use it regularly. It's not incredibly user-friendly.		A year plan was created with high aspirations, connected to the national inspirational goals, had input from the entire exec, and portions of it were created with full exec involvement. The majority of execs feel ownership over it and reference it regularly.		Your entire executive knows the value of a year plan, is connected to the national vision and broader objectives, has set high aspirations and has ambitious goals. The whole executive feels ownership over it, is motivated by it, and references it regularly as a tool throughout the year. It is connected to the national vision, themes and broader objectives. The year plan is perceived and used as a dynamic guide throughout the year, and not the holy grail.	
	<b>Timing</b>	Your year plan is finished in September.	You have the high level vision established by the end of your transition period (turnover retreat). You have a draft year plan in time for the summer regional retreats and a final version by July 31 <sup>st</sup> .		You have the high level vision established by the end of your transition period (retreat). You have a draft version of the year plan in time for the summer retreats. The year necessary year plan targets are entered into CHAMP.		You have a draft year plan after your transition period (turnover retreats) and your final year plan is finished by the summer regional retreats. The year necessary year plan targets are entered into CHAMP. September 1 <sup>st</sup> , each person is clear on what the year looks like, and their role to make that happen and are freggin' pumped by it!	
	<b>Work plans</b>	Your year plan is very general and doesn't have specific work plans for each exec member.	There are the very beginnings of specific work plans for each exec member – some timelines and sketchy details.		Your year plan has specific work plans for the execs that really took the initiative! As work plans are being implemented, CHAMP is being used to track progress, results, key learnings, and timely reflections.		Your year plan includes specific work plans for each executive member. As work plans are being implemented, CHAMP is being used to track progress, results, key learnings, and timely reflections.	
	<b>Communicate/ Transparency</b>	The majority of your membership doesn't know there's a year plan.	Major goals of the year plan are communicated to the membership.		Major goals of the year plan are communicated to the membership, on CHAMP, and to key stakeholders, as well as some details regarding timelines.		Your year plan is well communicated to your membership, on CHAMP, to key stakeholders, and is shared with other chapters on Chapters.Ewb.Ca	

Key Enablers: Information Technology

Level	Ah! Capacity		Minimum Capacity		Medium Capacity		High Capacity	
	1		2		3		4	
<b>Information Technology</b>	Chapter website	Your website doesn't exist or is very outdated. Information on current executives, programs, and/or events is inaccurate or difficult to find.	Your website uses the EWB logo. The information on it is accurate, but it is not updated frequently with new events/news.	Your website is updated regularly. Information is accurate and easy to find. Multiple people may be able to log in and update the site.	Your website is professional-looking, up-to-date, easily navigable and intuitive. Multiple people are able to update the site, and you may use statistics to monitor traffic.			
	myEWB usage	Your exec information on myEWB is outdated. Your chapter mailing list isn't managed through myEWB, and your exec doesn't use it for member management.	Your exec information is on myEWB, and you use myEWB mailing lists. Your chapter enters some information into CHAMP.	Your exec information and myEWB mailing lists are up-to-date. Your exec uses CHAMP regularly. Some members read myEWB and may join in some discussions.	Your exec information and myEWB mailing lists are up-to-date. Your exec uses CHAMP regularly. Members read myEWB and actively participate in discussions.			
	Mailing lists	Your chapter does not use its myEWB mailing list, or only uses it sporadically.	Your mailing list is used for announcements as events come up, but with little coordination or planning.	You send regular, planned mailings to your mailing list, which are coordinated through one person.	You send regular, coordinated mailings to your mailing list. Mailings use bold/italics/underline to highlight important information, and are structured and clear.			
	Sustainability	Your chapter does not have a full-time webmaster: either no one fills this role, or someone does it "on the side".	Your chapter has a dedicated webmaster who updates the website.	Your chapter has a dedicated webmaster that updates the site and oversees/promotes use of other IT tools (pictures gallery, etc).	Your chapter has more than one person acting in the webmaster/IT role; knowledge is passed on from year to year.			
	Other IT tools	Your chapter does not make use of IT tools other than your website and myEWB.	Your chapter checks the chapter email account regularly, and may also use your photo gallery, online donation form, and/or myEWB email forwards.	Your chapter checks the chapter email account regularly, as well as using your photo gallery, online donation form, and myEWB email forwards.	In addition to these tools, you also seek out other IT tools that enhance the capacity of your chapter. You share ideas and best practises with other chapters.			



Key Enablers: Executive Health

Level	Ah! Capacity		Minimum Capacity		Medium Capacity		High Capacity	
	1		2		3		4	
<b>Executive Health</b>	<b>Accountability &amp; Ownership</b>	Roles are ambiguous and unbalanced. Exec fails to meet their commitments to each other and to the chapter. Execs don't know what they are doing, nor what others are doing. There is a lack of trust between exec members.	Roles are initially well-defined but new initiatives can throw a big wrench in the system. Execs don't always follow through. Communication sometimes falls through the cracks, but generally people know what others are doing. Trust is good amongst most.	90% of the High Capacity ...		Your roles are all well-defined in a flexible and efficient structure. Your executive team has superb communication and trust – you feel like a family. There are clear lines of responsibility and accountability and each member of the exec feels responsible for the overall chapter success.		
	<b>Meetings</b>	People dread exec meetings and there is low turnout. The meetings don't have an agenda or minutes, they are inefficient and ineffective.	Exec meetings “feel like meetings” – people don't really look forward to them, but there is acceptable attendance and the job gets done.	Your exec meetings are well attended and efficient. There is an agenda and minutes. The meetings allow discussions and conversations around the right topics and priorities.		Your exec meetings have purpose, happen regularly, have an agenda that allows for focusing on what matters, are efficient, action-oriented, enjoyable, and you always have perfect attendance. Each exec lies awake in anticipation of the next exec meeting!		
	<b>Team</b>	There is very little focus on team building and the exec doesn't feel like a team. The exec only interacts in a work setting and don't enjoy each other's company.	There is a team feeling within the exec, but perhaps it's a bit clique-y or exclusive. Some of the members of your exec interact on a non-work basis. Each exec does not see where and how they overlap within the teams.	Your exec holds a team-building retreat, interacts on a non-work basis, and works to help each other reach their own highest potential. Steps have been developed to increase self awareness in the team.		Your executive team does 2 team-building retreats throughout the year and creates non-work related time to build relationships and have fun. Steps have been developed to increase self awareness in the team.		
	<b>Mission Creep</b>	Your exec doesn't identify mission creep or initiatives that will stretch the chapter thin, resulting in unfocused activities, burnout, and frustration. People draw the chapter in divergent directions.	Your exec identifies sources of mission creep or initiatives that will stretch the chapter thin as they play out or afterwards. The exec learns from these experiences.	Your exec does a good job of avoiding sources of mission creep or initiatives that will stretch the chapter thin, but struggles to keep the people behind these problems involved and energized.		Your exec does a stellar job of focusing on priorities and avoids creep or stretching the chapter thin. This is achieved without demotivating members whose ideas have to be modified or shut down.		
	<b>Synergy</b>	Your exec doesn't recognize when synergy is important and when it's not. Fundraising and outreach are often combined to the detriment of each.	Your exec understands the value of synergy and the potential problems it can create. You tread carefully when combining two very separate goals in an activity or collaborating with other groups.	Your exec recognizes when synergy is positive or negative, is careful to avoid the negative situations, and produces some solid synergies both when combining separate goals in an activity or collaborating with other groups.		Your exec does a superb job of recognizing when synergy is positive or negative. When you combine fundraising and outreach or collaborate with other groups, the result is always positive. You proactively avoid negative synergies.		

Key Enablers: National Community

Level	Ah! Capacity		Minimum Capacity		Medium Capacity		High Capacity	
	1		2		3		4	
<b>National Community</b> <i>(Note: Since this matrix implicates the betterment of the national community, it is expected all chapters are operating at "High Capacity")</i>	WebTrains/ Skype Calls	Your chapter's members miss a lot of WebTrains/Skype Calls.	Your chapter makes it to a majority of the WebTrains/Skype Calls, sometimes late, but usually prepared.	Your chapter makes almost all the WebTrains/Skype Calls prepared. Your chapter gives a heads-up to the facilitator when people are unable to make them, while also sending a replacement who is fully prepared.	Your chapter has perfect WebTrain/Skype Calls attendance and always shows up prepared; ready to contribute and take away info, with the intention to deepen the impact of the national community.			
	Chapter Visit	Your chapter visit is disorganized, your exec is nowhere to be seen during the day, and the opportunity is lost.	Your key chapter members devote the majority of the day to the chapter visit and interacting with the National Office staff. In addition to the sessions with these key people, a presentation for a wider audience is organized.	You arrange a pretty good chapter visit for September/October. Your exec devotes the majority of the day to the chapter visit sessions, they know what to expect, and have participated in informing the visits desired outcomes.	Your chapter arranges a kick-ass chapter visit for September/October that is planned to maximize impact every minute. Your entire exec feel like they own the success of the visit, are excited about the visit and skip the whole day of class to focus on EWB.			
	Chapter Buddy	You don't know the purpose of a chapter buddy or who your chapter buddy is, you don't communicate with them, or you have an unhealthy relationship with them.	You communicate the bare essentials to your chapter buddy over e-mail, but the two of you aren't particularly comfortable with each other. You don't feel that your chapter buddy understands your chapter well.	You have a healthy relationship with your chapter buddy, and for the most part you have an open and honest relationship. You communicate over e-mail and sometimes phone and you feel they understand your chapter well.	You think of your chapter buddy as a mentor, coach, and friend. You're in regular communication (phone, e-mail, telepathy), you have an open and honest relationship with them. You can confidently say that they understand the key challenges and successes at a given instance.			
	Conference	Your National Conference delegation is mostly graduating members or brand new members that you're taking a risk on. Your delegation does no prep work for the conference, doesn't meet while at the conference, and there is no follow-up upon return.	Your delegation may be overly high in graduating members or brand new members. Not all expectations are clear – some may be motivated more by the free trip than the learning opportunity. Your delegation has difficulty meeting during conference.	Your delegation has a good mix of new and old, does some prep work ahead of time, meets during the conference, and plans to share its learning upon return. Most delegates have realistic expectations.	Your National Conference delegation has a "perfect" mix of new and old members, prepares ahead of time, and has the expectations down. They strategize before, during and after the conference to maximize chapter learning, and create a forum to both share and apply their learning's upon return.			
	Regional Retreat	Your members don't take the summer retreat in June/July seriously, or don't see the value in it.	Most of the execs that are in the general area attend, and you fill the remaining spots with other dedicated members.	Almost your entire delegation is made up of the current exec, and people come with a great mindset, but not necessarily prepared. Execs in other regions during the summer, attend the retreat closest to them.	Your 8-10 core exec members have planned their summer schedule around the summer regional retreats in June/July, and see it as tremendously valuable. This delegation comes prepared individually and collectively, and ready to both work and party hard.			

## Year Planning

An incredibly important part of any activity is the planning that is done ahead of time. Your year as chapter leaders is no different. Your plan provides the whole chapter with the opportunity to develop a common vision, define roles, and allocate resources effectively to maximize impact. For a year plan to be effective it must contain quality goals, have ownership from the whole team, and be applicable throughout the year. The process used to design your year plan is almost as important as the plan itself. Every team has a different situation but there are a few common elements of a good process and a good plan.

### **Goal Setting: Vision to Action**

The first step is deciding what you want to achieve. Many chapters have found that moving from a common chapter vision to individual goals to the tasks or activities required to meet the goals is an inspirational and effective way of getting things started.



***One way of setting quality goals is the S.M.A.R.T. goal method. These are goals that are: Specific, Measurable, Attainable, Realistic, and Timely. For more info on SMART goal setting go to [chapters.ewb.ca](http://chapters.ewb.ca)***



***A great tool to use to get started on year planning is the chapter capacity matrices.***

### **Ownership**

It is important to involve everyone in the process of creating the year plan. Each person will be doing their own work so they should be involved in setting their own goals and timelines. People plan very differently so having a flexible structure but still coming up with a cohesive plan is challenging but worthwhile.

### **Applicability**

To make the plan something that will help your chapter perform instead of just being a good looking waste of paper it has to stay applicable to what you want to do. Your team and your plan will have to be flexible enough to evaluate adapt to the opportunities as they present themselves. The plan will also have to relate to what your chapter is doing.



***Checking up on your plan periodically to update it and evaluate what you have accomplished will keep it useful throughout the year.***



***The chapter capacity matrices found above and on [chapters.ewb.ca](http://chapters.ewb.ca) is an excellent tool for the whole executive team to use to start the year planning process by evaluating where you are at and where you want to be with concrete improvement ideas.***

