*The Chapter Annual Plan is designed to help new and current chapters map out a strategy for success. Whether you’re a new chapter building out their first corporate strategy or long-time chapter hoping to refresh their member engagement, this document guides you in creating sustainable, tangible results.*

**Chapter Name: Date:**

1. **Who is a part of your core team and what is their role?**

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| --- | --- | --- |
| **Name** | **Role** | **Email** |
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1. **Goals for the Year:** *(SMART goals – Specific Measurable Attainable Realistic Timely) Examples:*

*- Recruit & train 2 new core team members by June to help provide leadership to chapter.*

*- Sign up 10 new monthly donors this year to create an ongoing donation stream for our chapter.*

*- Train & implement new chapter technology tools as they become available.*

*- Raise $10,000 to become eligible to apply for chapter status.*

*- Make 2 new corporate connections to explore opportunities for funding with Room to Read.*

*- Increase # of active fundraisers by 10% on chapter’s Classy fundraising page.*

*- Grow Facebook followers to 200 by asking our active volunteers to suggest our page to their friends and family.*

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| --- | --- |
| Goal | Description |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |

1. **Recent Accomplishments** *(Please be specific and include dates and event details, if applicable)***:**

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1. **Recent or Anticipated Challenges** *(Please be specific and include dates and event details, if applicable)***:**

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1. **Revenue:**

**This Year’s Revenue Goal**

|  |  |
| --- | --- |
| **Source** *(ie. Spring event, Corporate giving,*  *Individual giving, Monthly Gifts)* | **Amount** |
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**This year’s goal TOTAL: \_\_\_\_\_\_\_\_\_\_\_\_\_**

**Twelve Month Activity Plan (Fundraising & Awareness Building)** *Stay updated with Room to Read emails for market-specific match periods (Mother’s Day, Fiscal end of year (EOY), etc.)*

**What events and strategies will your chapter use to meet your goals?**

*Examples: Small events (Beers for Books), large events (galas), corporate support*, *student groups, etc.*

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| --- | --- | --- |
| **January** | **February** | **March** |
| **April** | **May**  *Girls’ Education Program matching gift campaign* | **June** |
| **July** | **August** | **September**  *International Literacy Day (Sept 8)* |
| **October**  *Int’l. Day of the Girl Child (Oct 11)* | **November** *End of Year Campaign*  *Nov-Dec matching gift campaign* | **December** *End of Year Campaign*  *Nov–Dec matching gift campaign* |

1. **Do you foresee any transition in your core team over the next 1-2 years? If so, how will you manage that? What type of succession plan will ensure your chapter remains successful over the next 2-5 years?**

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1. **What resources/collaboration will help you accomplish your goals? Include details such as: volunteer management, leveraging events, materials, training, etc.**

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| --- | --- | --- |
| Connection | Team Member | Details |
| Fellow Chapters |  |  |
| Resources |  |  |