

**NEWH Chapter Business Plan**

NEWH/(chapter) – (year)

**What is a Chapter Business Plan?**

A business plan helps to ensure the Chapter’s success and outlines the operating framework of the Chapter by detailing who you are, your plans/goals, and how you will generate proceeds for NEWH's mission of scholarship and education.

The President should work with Board members to create and submit a business plan for the Chapter by the end of January. (Template located on NEWH website - Board Resources)

**What’s included in the business plan?**

* List of the Chapter Board of Directors/Chairs
* Chapter Event Calendar
* Approved Chapter Budget

**Other helpful items to include in your business plan:**

* Ask each Director/Chair to create 2-3 goals they’d like to complete for the year.
* Conduct a SGOT analysis. Refer to this throughout the year and in future strategic planning sessions

**CHECK LIST**

*Required* - these items **must** be submitted to the NEWH, Inc. office (newh.finance@newh.org)

* **Board of Directors/Chairs**

*NEWH has a list of your nominated board – please submit any chairs appointed by the board by January 31st – and as additional chairs are appointed, or any board changes occur throughout the year*

* **Chapter Event Calendar**

*Calendar will be posted on the NEWH website – specific calendar dates will be added to the event calendar. Calendar should be submitted by January 31st*

* **Chapter Budget**

*Submit an approved budget to NEWH Inc. by the end of February – please contact the NEWH office for any resources you may need (past budgets, budget template, etc.)*

The following pages can be used as a template to submit the required items.

**Other Helpful Items to include in your Chapter Business Plan**

**Written Goals**:

Ask each director/chair to write 2-3 goals they’d like to complete for the year. These goals will be the starting point for board discussion and planning throughout the year.

Here are a few examples:

* Your membership director has a goal to get more students members involved in your events. This goal should be shared with the chapter programming director and the scholarship director to ensure that one of your chapter programs planned includes student involvement (i.e. portfolio review, mentoring event, etc.)
* Your scholarship director has a goal to increase the amount of student scholarship applications received. This goal should be shared with your board and a plan should be put into place for chapter members to visit local schools, or contact schools in your surrounding area, to speak to students about NEWH’s scholarship opportunities.
* Your VP/Development has a goal to increase the number of committee members in your chapter. This goal could be shared with your membership director and other board members to formulate a plan to reach out to current members, and new members, to find out members’ interest to be involved and asking them to volunteer.

**SGOT Analysis**:

Conduct a SGOT analysis with your board – this is helpful to refer to throughout the year, as well as when conducting strategic planning in future years to gauge how your chapter addressed gaps, opportunities, etc.

S – Strengths

Internal Factors (things you have control over)

G – Gaps

O – Opportunities

External Factors (things you have no control over)

T – Threats

**Chapter Board**

|  |  |
| --- | --- |
| President | enter president |
| VP-Administration/Delegate | enter vp-admin/delegate |
| VP-Development | enter vp/development |
| Secretary | enter secretary |
| Treasurer | enter treasurer |
| Past Pres./Parliamentarian/Delegate | enter past president/delegate |
| Executive Advisor | enter executive advisor |
| Scholarship | enter director |
| Membership | enter director |
| Programming | enter director |
| Fundraising | enter director |
| Student Relations | enter director |
| Equity, Inclusion, and Diversity | enter director |
| Marketing | enter director |

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| --- | --- | --- | --- |
| **Optional Positions** | | | |
| By-laws & Ethics | enter chair | Internet Communications | enter chair |
| CEU | enter chair | Public Relations | enter chair |
| Committee Development | enter chair | Publications | enter chair |
| Community Service | enter chair | Regional Tradeshow | enter chair |
| Database | enter chair | Strategic Alliances | enter chair |
| Education/Mentoring | enter chair | Strategic Planning | enter chair |
| Farewell Ambassador | enter chair | Student Representative | enter chair |
| Historian | enter chair | Green Voice | enter chair |
| Hospitality | enter chair | Ways & Means | enter chair |

**Calendar of Events**

Chapters are encouraged to form their calendar prior to the year beginning. Submit your Chapter Calendar to the NEWH Office no later than January 31st of each year.

**Programming/Networking Events:** Chapters are not required to hold an event each month. When putting together your calendar for the year, the key is to remember quality vs quantity. Instead of struggling to put on an event every month, plan 3-4 great programming events for the year (tours, speakers, panels, CEUs, etc.) that are of high value to designers, manufacturers, and students – and in between those events, do more low-key happy hour/sundowner type events. A program’s mission is to develop relationships and build membership in a more business type setting.

Think about the event – is it an event you don’t want to miss, or is it more of a casual networking event that may not be as beneficial to you? Focus on what your members are going to be attracted to, especially venues – whether it’s a newly opened or remodeled hotel, new restaurants, etc. Invite those involved in the project to speak.

**Fundraising Event**: Remember, chapters are required to hold at least one fundraising event per year – this is your FUN event. A FUNdraiser’s purpose is to raise money for NEWH’s mission of Scholarship & Education.

**Board Meetings**: Chapters are required to hold at least 10 Board of Directors Meetings per year.

|  |  |
| --- | --- |
| January  *Example:*  2nd – Board Meeting  11th – Sundowner/Happy Hour | February |
| March | April |
| May | June |
| July | August |
| September | October |
| November | December |

**SGOT Analysis**

|  |  |
| --- | --- |
| Strengths | Gaps |
| Opportunities | Threats |