

# JCI Local Officer Training

## **Local Action Guide**

(2018)



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## INTRODUCTION

The JCI Local Officer training and transition process is one of the most important responsibilities of a JCI Local Organization from year-to-year. JCI's one year to lead philosophy establishes a constant change in leadership. This practice helps ensure young people are given the opportunity to develop leadership skills and contribute their ideas for building a better society. However, this practice also creates many challenges including transferring knowledge, maintaining relationships and keeping members engaged.

Local Officer training helps address those challenges by facilitating an effective transfer of knowledge and information from year-to-year. An effective JCI Officer training can ensure continuity from year-to-year and determine the success of your JCI Local Organization in achieving its goals for the upcoming year.

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The purpose of JCI Officer training and transition is to:

- Provide an opportunity for reflection and evaluation for outgoing officers
- Successfully recruit and retain new officers
- Educate new officers regarding organization policies and procedures
- Prepare new officers to take on the challenges of their duties and responsibilities successfully and without hesitation
- Put organizations on track to achieve their goals for the next year and beyond

This guide provides the process and resources needed to assist outgoing officers in their planning and the implementation of a strong JCI Officer training program for incoming officers enabling them to effectively plan for the year ahead and beyond.

This guide should be used by JCI National Officers and the outgoing Local Board of Directors to understand the important information incoming officers should have, the roles and responsibilities of their position, how to lead their Local Organization in achieving its goals for the year and unite all sectors of society for sustainable impact. This guide can also be used to organize National Officer trainings.

Community organizations like JCI are geared toward action and impact. There are urgent challenges we need to solve in our communities, which is why we come together in the first place. But for groups to be successful, we must spend time focusing on the skills that empower our members and leaders to make this impact happen.

## OFFICER'S ACTIONS BEFORE END OF YEAR

As the year comes to an end, there are specific responsibilities each Local Organization must complete prior to the JCI Local Officer training to ensure a smooth and effective transfer of knowledge from the outgoing to the incoming Board.

### 1. Evaluate Past Year's Achievements

The main task of the Board is to manage the administration of the Local Organization and implementation of the plan of action. Therefore, at the end of the year, the Board must evaluate what goals were achieved, which ones were not and why. This information is not only important for creating the plan of action for the upcoming year but it also helps prepare the incoming Board to lead in the implementation of the plan of action.

### 2. Identify Leaders for Incoming Board of Directors

Often young members of a JCI Local Organization are not fully aware of the leadership opportunities available to them. Throughout the year, the Local Board should identify and encourage members with the skills and capabilities required to run for a JCI Officer position; however, make sure to not interfere with the democratic election process.

### 3. Conduct Elections

Elections should be held 1–2 months prior to the transition of JCI Officers. Elections should be kept formal, transparent and democratic. Candidates for office can prepare a résumé or promotional materials showcasing how they would make an effective JCI Local Officer. During the actual elections, give candidates the opportunity to speak to the members about their vision for the future of the organization. Elections should be conducted with printed ballots, a discrete voting process and a neutral party to count ballots.

### 4. Shadowing

Once new JCI Officers are elected, begin the knowledge transfer with a shadowing process. Incoming officers should shadow the officer that they will be replacing. During this process, the outgoing officer should ensure the incoming officer is familiar with JCI's Mission, organizational goals and the most updated Constitution. They should introduce them to any key people they might have to work with throughout the year. They should also share the platforms and accounts they use regularly to complete their tasks as well as tips for serving in the elected position.

# OFFICER'S ACTIONS BEFORE END OF YEAR

## 5. Preparing Information for Handover

Throughout their year of service, each officer might accumulate a number of documents, information, files, etc. that are relevant for that Local Officer position. Each officer should review their materials and prepare the information for handover to the incoming officer. Individuals might prepare a binder for the information or share the files using online platforms such as Google Drive. It is important that officers keep these files organized and updated from year-to-year. Documents and files irrelevant to the organization's operations can be removed.

## 6. Constitution

Throughout the year, depending on how the Local Organization operates, they may have adopted or approved changes to the Local Organization Constitution and policy manual. It is important that these changes are made within the official document and shared with members. Outgoing officers should review these changes with the incoming Board as well as discuss any provisions within the Constitution relating to a specific position. If the Local Organization Constitution is changed, verify with local authorities and governments if the updated Constitution needs to be registered for the organization to be a legally valid nonprofit in the community.

## 7. Plan for Training

The outgoing Board should be involved in the planning and preparation of the Local or National Officer training. As a Board, determine aspects of the training such as who is the target audience for attendance, who will be the main facilitator, when and where will the event take place and how the costs of the event will be covered. Planning for the Local Officer training and ensuring an effective transfer of knowledge is the last major responsibility of the Board before their one year to lead comes to an end.

## IDENTIFYING LOCAL OFFICER TRAINING FACILITATORS

A facilitator guides participants through a series of sessions that make up Local Officer training. While there may be a team of individuals working to develop the program, organize logistics and lead specific sessions, the facilitator is the one to draw connections from session to session to ensure that participants understand the content, meet expectations and achieve the goals of the training.

In summary, the training facilitator is responsible for:

- Understanding the goals of the meeting and organization
- Assuring the group is following the agenda and moving forward
- Involving and encouraging everyone in the training to participate
- Ensuring decisions, ideas and input are made and/or given democratically

### Facilitators Should Have the Following:

- Experience in both local and national leadership positions within JCI
- Practice as a skilled trainer of JCI Impact, JCI Achieve and JCI Effective Leadership
- Strong knowledge of JCI at the local, national and international level and familiarity with the 2014 -2018 JCI Strategic Plan.
- Experience implementing the JCI Active Citizen Framework in their community.

### Action Steps for Facilitators to Prepare

- Review the Plan of Action from the previous year to understand which goals were achieved, which ones were not and why.
- Review the Plan of Action for the upcoming year and the role Local Officers have in implementing the Plan of Action.
- Work with the outgoing Board to plan the training's program.
- If individuals are leading specific sessions throughout the training program, ensure they are prepared and review what will be presented in advance.

### Planning a Good Facilitation Process

To plan an effective training, facilitators should focus on the following conditions:

- Climate and Environment  
Ensure that the training space is comfortable and accessible to everyone. It should be the right size for the number of participants present.
- Logistics and Room Arrangements  
Oversee everything from the arrangement of tables and chairs, providing refreshments, to managing microphones and audiovisual equipment. Ensure the room set-up is conducive to the trainings and goals that the organization wishes to achieve.
- Ground Rules  
Rules can empower participants to feel comfortable contributing. Common ground rules may include limiting one person to talking at a time, returning timely from breaks and respect for one another's ideas and opinions.

## RECOMMENDED PROGRAM OVERVIEW

The recommended JCI Officer Training Program is designed to ensure incoming Local Officers will gain a strong understanding of JCI at the local, national and international level as well as the role they play in achieving the JCI Mission. Throughout the training, each session builds on one another, incorporating information and lessons from the previous sessions. It is important to remember that the JCI Local Officer training is just part of a larger handover process for JCI Organizations.

Time	Program	Purpose and Description	Room Layout
60 Min.	Welcome and Introduction	For the incoming Board to visualize themselves as part of one team with shared goals and one Mission and Vision.	Theatre   Open Space
60 Min.	Knowing the Organization	Participants discuss in depth the JCI Mission, Vision and Strategic Plan.	Banquet
60 Min.	Organizational Analysis	Participants evaluate the organization through a number of analysis exercises to identify and plan for long-term goals.	Banquet
60 Min.	Plan of Action	To understand how the Plan of Action achieves the Mission of the organization and their role to implement it as a Board member.	Banquet
60 Min.	Lunch Break		
60 Min.	Roles and Responsibilities	To recognize their role and responsibility as an officer of the organization as well as their responsibility to the community.	Banquet
60 Min.	How to be Effective as a Leader	To understand key concepts of effective leadership with emphasis on actions of an effective leader does and how participants can build those skills.	Banquet
60 Min.	Open Forum	An opportunity for participants to ask questions and share their ideas.	Theatre   Panel at Front
60 Min.	Power Close	An impact talk from past members or a community leader that will inspire action and impact.	Banquet
<i>*Coffee and/or tea breaks are not listed but recommended for a full day program.</i>			

It is important for JCI Organizations to remember that this is just a recommended program that can be adapted and tailored to the needs, structure and long-term goals of your organization.

# RECOMMENDED PROGRAM

## OVERVIEW

### What to Consider When Preparing the Program

There are key things each JCI Organization should consider when determining if and how to tailor the recommended JCI Officer Training Program.

- Is the training for incoming Local Officers, National Officers or both?
- How large is the Local and/or National Organization? How does this impact the structure of its Board and the number of positions?
- What has been the history of impact the JCI Organization has had on the local community and/or country?
- How much time can be allocated for Local Officer training?
- What are the goals for the upcoming year as outlined in the local JCI Plan of Action, and are there any JCI Programs, trainings or presentations that can provide understanding in order for the Board to achieve those goals?
- Have incoming officers gone through and graduated from JCI Official Courses so that they can provide skills development opportunities to other JCI members?
- What are the current strengths, weaknesses, opportunities and threats to the sustainability of the Local and/or National Organization? How can the training of your Board help address these gaps and opportunities?

### Pre-Training Survey

Some of the questions listed above can be answered through a simple pre-training survey that is administered to the target audience of incoming officers. A survey can help in understanding what the incoming officers' expectations for the training are, most important skills needed and how the training can meet those needs and expectations.

### JCI Resources to Support Adapting

There are numerous JCI presentations, resources, and Skills Development courses that can be incorporated into the Local/National Officer training to enhance the understanding, skills and empowerment of incoming officers.

- JCI Achieve
- JCI Impact Strategy
- JCI Opportunity to Impact
- 2014 – 2018 JCI Strategic Plan
- Current Annual JCI Plan of action
- JCI Admin
- JCI Effective Communications Series
- JCI Effective Meetings
- JCI Effective Leadership
- 10 Things to Know About JCI (Current Year)
- JCI Active Citizen Framework
- JCI Impact
- JCI Local Action Guides



# RECOMMENDED PROGRAM

## WELCOME AND INTRODUCTION

**Duration:** 60 Minutes

### Purpose

The purpose of this session is to have the incoming Board visualize themselves as one team with shared goals and one Mission and Vision to work toward. This session will also include a team building and icebreaker exercise for individuals to get to know and understand one another.

### Objectives

- Provide an inspiring welcome to participants to get them in the right mindset for the training program.
- Outline the purpose, objectives and expectations of the training as well as the program for meeting those objectives and expectations.
- Conduct an icebreaker and team building exercise that enables participants to get to know one another and better understand how they can work effectively as a team over the course of the next year.

### Session Outline | Sections

- I. Welcome by Host Local President (3 minutes)
- II. Welcome by Highest Officer (5 minutes)
- III. Introduction by Training Facilitator (10 minutes)
  - a. Facilitator shares experiences (within and outside JCI)
  - b. Review participant expectations of training program
  - c. Establish purpose and objectives of training program
- IV. Ice Breaker Exercise (15 minutes)
- V. Team Building Exercise (25 minutes)
- VI. Transition to Next Session (2 minutes)

### Call to Action

To actively participate throughout JCI Officer Training as new information is presented so to be able to communicate how to connect local actions together for global impact and achievement of the JCI Mission.

### Activities Explained

#### Ice Breaker Exercise: “Who’s Done It?”

Prior to the training, prepare a list of 25 experiences or skills that would be useful to an incoming JCI Officer. Be sure to leave space below each item and make enough copies for each participant. Instruct participants to go around the room meeting other participants and identify if they have any of the skills or experiences listed. If they do, have them sign the worksheet with their incoming position under the skill they possess. At the end of the activity, go around and share interesting facts they learned about their fellow Board that could be useful throughout the year.

## RECOMMENDED PROGRAM

### WELCOME AND INTRODUCTION

#### Team Building Exercise: “Team Work on Lava Flow”

Prior to this activity, make sure to set up the room. Place two long pieces of tape on either side of the room to mark where participants will start and end. Repeat this creating a second path. Spread 20 pieces of card-board evenly between the two sets of tape. This is called the “Lava Flow.” Break participants into two teams. Instruct them that the objective of the exercise is to get all of their team members across the lava safely while all holding hands. If a team member steps off the cardboard “rocks” and into the lava, or if they break hold of each other’s hands, the whole team must return to the start of the tape and start over. Provide each team half of the blindfolds and hand ties. Instruct them that 3–5 participants must tie the hand ties around their hands clasping them together. Another 3–5 participants must tie the remaining blindfolds around their eyes so they cannot see. This leaves half of the team able to see and use their hands. Instruct them that in order to succeed, they must work together using their abilities and disabilities to cross the lava flow without touching it. This will help the team develop communication, cooperation and problem solving skills together. At the end of the activity, review and ask participants what they learned from this experience. How did they solve the challenge? What kind of leadership and teamwork skills did it take to cross the lava?

#### Key Points Explained

##### Teamwork

Effective teamwork is key to the successful operation of a JCI Local Organization and a strong team can overcome challenges it may encounter in the year ahead.

##### Notes for Trainer | Facilitator

The facilitator should be the main speaker and trainer for this section; however, additional speakers can be involved and contribute during the ice-breaker exercise.

Throughout the training, the facilitator should be conscious of how the incoming officers work together as a team. The entire Local Officer training is an opportunity to build an effective team that will lead for the next year. Pay attention to these important building blocks of an effective team:

- Clear objectives
- Good communication
- Balanced roles
- Mutual cooperation
- Regular review

##### Room Layout

- Theatre style on one half of room
- Open space on other half of room

##### Materials Needed

- ‘Who’s Done It’ Worksheet (Located in Appendix)
- 10 Bandana’s, Ribbon and/or material to serve as blind fold and hand tie
- 10–15 pieces of cardboard

# RECOMMENDED PROGRAM

## KNOWING THE ORGANIZATION

**Duration:** 60 Minutes

### Purpose

The purpose of this session is for participants to understand why JCI does what it does, how the Local Organization can achieve that purpose, and the role of JCI Officers in enabling JCI members and organizations to achieve the JCI Mission, Vision and strategic goals.

### Objectives

- Understand the “why” of JCI
- Hold a discussion about the JCI Mission and Vision and the roles that JCI Local and National Organizations play as well as their Boards in empowering young people to create positive change
- Empower officers with the knowledge and resources to further develop their understanding of JCI’s unique history, structure and impact and be JCI spokespeople in their country and communities.

### Session Outline | Sections

#### I. Inspirational Introduction

- a. “Start with Why” Video by Simon Sinek (TED Talks Speaker)
- b. Activity: Why does JCI exist?

#### II. JCI Mission, Vision and Values

#### III. Organizational Structure to Achieve Goals

#### IV. JCI Legacy of Impact

- a. JCI 100th Anniversary Video(s)
- b. JCI Local / National Organization’s History

#### V. 2014 – 2018 JCI Strategic Position

#### VI. JCI Active Citizen Framework

#### VII. Activity: Being a JCI Spokesperson

#### VIII. Conclusion

### Call to Action

As participants embark on their year as a JCI Officer, encourage them to prepare themselves to not only lead the organization but also to be a representative of JCI in the local community. They can practice talking about JCI, review informational material about the organization and start sharing the organization’s legacy of impact with their community and country.

### Activities Explained

#### WHY does JCI exist?

Prior to this activity, share Simon Sinek’s TED Talks video, “Start With Why” with the participants. Following the video, ask the group the following question, “What is your Why? What is motivating you to be a JCI Officer?” Have participants share their answers with the group. After several responses, ask the follow-up question, “What is JCI’s Why?” Write responses on a piece of flip chart paper and connect the responses to the purpose.

## RECOMMENDED PROGRAM

### KNOWING THE ORGANIZATION

#### Being a JCI Spokesperson

Instruct participants to break up into groups of three. Have individuals take turns within their groups delivering a 30-second “elevator speech” that explains who JCI is in a way that is engaging and gets the listener interested in learning more. Groups should time their speeches to ensure they are able to present the most important information about JCI — delivering the most effective message — within the timeframe. Have each group pick one individual to deliver their speech to the larger group.

#### Key Points Explained

##### Start with Why

Great leaders are those who can inspire people to act. Those who are able to inspire give people a sense of purpose or belonging that has little to do with incentives or benefits. Those who effectively lead are able to mobilize individuals, members and like-minded stakeholders to create positive change. Everyone has the ability to think, act and communicate like those who have inspired us. It all begins with the why.

##### Elevator Speech

An elevator speech is a clear, brief message about the JCI Local Organization. It communicates who the organization is, the actions it takes, what it is looking for and how it can benefit a company or organization in regards to collaboration. Check out these example elevator speeches about JCI:

###### **International Elevator Speech**

JCI is a membership based international nonprofit organization of young people ages 18–40. Our Mission is to provide development opportunities that empower young people to create positive change. Our members, who work in over 120 countries worldwide, seek targeted and sustainable solutions to the most pressing challenges facing their communities. Together through grassroots action, our global network of nearly 200,000 young active citizens creates sustainable impact each and every day.

###### **JCI Local Organization Elevator Speech**

JCI \_\_\_\_\_ is a local community organization whose mission is to provide development opportunities that empower young people, between the ages of 18 to 40, to create positive change in the community. Our members, who are part of a global network of nearly 200,000 active citizens, take action to improve their community, developing themselves in the process. Supported by the Junior Chamber International network, JCI’s grassroots actions contribute to building a better world.

#### Notes for Trainer | Facilitator

The facilitator should be the main speaker and trainer for this section however additional speakers can be involved and contribute during the following sections: Alumni | Senator and Organization’s History

#### Room Layout

- Theatre style or banquet style

#### Materials Needed

- Audio Visual Equipment (Projector, screen, computer, speakers)
- Organization Structure Overview (Located in appendix)
- Organization History (Located in appendix)
- JCI 100th Anniversary Short Video(s)
- Flip Chart Paper and Markers

# RECOMMENDED PROGRAM

## ORGANIZATIONAL ANALYSIS

Duration: 60 Minutes

### Purpose

The purpose of this session is to allow incoming officers the opportunity for in depth analysis of the organization and its current situation so that they can strategically identify long term goals and plan for sustainable impact.

### Objectives

- Conduct a situational analysis identifying strengths, weaknesses, opportunities and threats.
- Organize a visioning exercise for the officers to build consensus on the goals they want to achieve for the year and beyond.
- Ensure the continuous strategic planning process from formulating the plan if needed to monitoring and evaluating efforts to implement a current strategic plan.
- Review and evaluate current activities, projects and events that happen annually to ensure they are working toward the JCI Mission and the organization's long term goals.

### Session Outline | Sections

- I. Overview of the Strategic Planning Process
  - a. What is it and why is it important?
  - b. Review past Strategic Plans and planning processes by the Local Organization
- II. SWOT Analysis Exercise
- III. Strategic Visioning Exercise
  - a. Determining long-term goals
  - b. Identifying strategies to achieve them
- V. Organization Program Activity Evaluation
- VII. Engaging the Next Generation of Active Citizens
- VIII. Conclusion

### Call to Action

While officers will only serve in their position for one year, their responsibility to the organization extends beyond that. Local Officers must have a long-term strategic view of the organization. All decisions that are made should support the sustainability of the organization in addition to achieving the JCI Mission.

### Activities Explained

#### SWOT Analysis

As a group work to identify the organization's internal strengths and weaknesses, as well as its external opportunities and threats and list them on the flip chart paper. Review the ideas and reach a consensus. Brainstorm how this analysis relates to the Local Organization's current strategic plan or planning efforts. Which of the organization's strengths can be focused on while minimizing threats and taking advantage of the opportunities available?

## RECOMMENDED PROGRAM

### ORGANIZATIONAL ANALYSIS

#### Strategic Visioning Exercise

This exercise happens in rounds. During the first-round participants individually brainstorm their biggest hopes and dreams for the organization and their community. They will write each individual idea on a single Post-it note, coming up with as many ideas as possible in the 2-minutes they are provided. The participants will then gather in small groups and share their ideas while combining similar ones, removing ones that people do not agree upon and identifying connections between them. As a large group, create a list of 3–5 strong goals that create a vision for the future of the organization.

#### Organization Program of Activities Evaluation

In small groups, participants should review programs and activities that happen from year-to-year to ensure they are still relevant to the organization, achieving their purpose as well as working toward the JCI Mission and Vision and moving the organization toward achieving its long-term goals.

#### Engaging the Next Generation of Active Citizens

This interactive activity focuses on ensuring the organization is considering not only the world in which the organization exists in today but also the world that will exist tomorrow, so that it can be attractive to the next generation of young active citizens. The exercise works to understand who young people are and what motivates them to take action for positive change in the world today.

### Key Points Explained

#### Strategic Planning

Strategic planning is an organizational management process that should happen every 3–5 years within your organization. The process is used to identify long-term goals, focus energy and resources, strengthen operations and ensure all organizational stakeholders are working toward a common purpose. The process is also critical for the organization to adapt to a changing environment.

#### Notes for Trainer | Facilitator

The facilitator should be the main speaker and trainer for this section.

#### Room Layout

- Banquet style

#### Materials Needed

- Audio Visual Equipment (Projector, Screen, Computer, Speakers)
- Flip Chart Paper and Markers
- Post-it notes and pens
- Tape
- Flip Chart Paper and Markers
- Engaging the Next Generation of Active Citizens Presentation

# RECOMMENDED PROGRAM

## ANNUAL PLAN OF ACTION

**Duration:** 60 Minutes

### Purpose

The purpose of this session is for incoming officers to review their Plan of Action for the incoming year and discuss actions they can take as a Board to educate members, enable implementation and achieve the goals as outlined. The Plan of Action should be presented within the context of the 2014–2018 JCI Strategic Plan.

### Objectives

- Review achievements of the previous year that the incoming officers can continue to build on to achieve the organization’s long-term goals and Mission.
- Evaluate the Plan of Action for the upcoming year and how it accomplishes the Mission of the organization and its long-term strategic goals.
- Analyze the Plan of Action against the national and international plan of action to discover opportunities for support, empowerment and impact in the local community.

### Session Outline | Sections

- I. The Annual Plan of Action
  - a. Why is it important?
  - b. Criteria for an effective Plan of Action
- II. Review JCI Plan of Action for Incoming Year
  - a. Local
  - b. National
  - c. International
- III. Officer Roles in Implementing
- IV. Activity: Commitments for Success

### Call to Action

The Local Board of Directors created the Plan of Action for a reason and must ensure to follow up on it regularly. The Plan of Action will be used by both the Board and local members, so it is up to Local Officers to help individuals fulfill their commitments. Refer to the Plan of Action during meetings and have members present progress on tasks they are responsible for. Ensure everyone understands the plan’s objectives, deadlines and responsibilities and make sure to celebrate big accomplishments. Always ask for feedback and input from members about how the organization can improve in achieving its shared goals for creating positive change.

### Activities Explained

#### Commitments for Success

By the end of the Plan of Action Session, all incoming Board members should have a good understanding of the Plan of Action for the upcoming year and their role in implementing it. Have each participant think of three commitments they can take to ensure the accountability of the Board, implementation of the plan and the success in achieving the Local Organization’s goal.

## RECOMMENDED PROGRAM

### ANNUAL PLAN OF ACTION

Have participants write their three commitments twice – one card will be for them to keep and the other will be kept by the Local Organization and regularly shared to remind everyone of their commitments. If time allows, have the Officers share their commitments to ensure success for the upcoming year.

### Key Points Explained

#### Planning for Success

There is an inspirational adage that says, “People don’t plan to fail. Instead, they fail to plan.” Certainly, because no one wants to fail, it makes sense to take necessary steps to ensure success, including developing an annual Plan of Action that will guide the organization for the incoming year.

Work the plan, but don’t be afraid to adjust it. Any plan and timeline should be solid enough to guide one’s work and evaluate progress. But it should also be flexible enough to respond to unexpected obstacles and adjust to new developments.

#### Notes for Trainer | Facilitator

It is important that the National Organization has already developed the Plan of Action for the incoming year by the time that the officer training is conducted, as it will be used throughout the training. If one is not developed, the trainer should refer to the national and/or international Plan of Action as a resource.

The facilitator can be the main speaker and trainer for this section. However, it can also be facilitated by the following local JCI stakeholders who can also lead the following activities listed:

- Immediate Past Local President | The Annual Plan of Action, Review of Local Plan of Action, Officer Roles and Commitments for Success
- National Officer (Previous or Incoming) | Review of National Plan of Action
- International Officer (Previous or Incoming) | Review of International Plan of Action

#### Room Layout

- Banquet Style

#### Materials Needed

- Copies of Plan of Action (local, national and/or international)
- Note cards (two per person)
- Permanent Markers



## RECOMMENDED PROGRAM

### ROLES AND RESPONSIBILITIES

**Duration:** 90 Minutes

#### Purpose

This session will consist of a facilitated one-on-one discussion between incoming and outgoing officers about their position, the responsibilities it entails and their role within the Board. This session will also review how the Board will work throughout the year to ensure they are accountable in implementing the Plan of Action.

#### Objectives

- This program builds on the “Knowing the Organization” session to further incoming officers’ knowledge of their responsibilities in the organization and community.

#### Session Outline | Sections

- I. The JCI Board of Directors
  - a. Responsibilities in the Organization
  - b. Responsibilities in the Community
- II. Review of Organizational Chart + Network of Support
  - a. Local
  - b. National
  - c. International
- III. Officer-to-Officer Knowledge Transfer
- IV. Goal Setting

#### Call to Action

Each individual should create a personal plan for achieving his/her own goals and the goals of the Board to ensure support for the organization in achieving its Mission to provide development opportunities that empower young people to create positive change.

### Activities Explained

#### Officer-to-Officer Knowledge Transfer

Incoming officers will pair up with outgoing officers to transfer important knowledge about how to successfully fulfill that role and complete their responsibilities. Using the knowledge transfer worksheet, outgoing and incoming officers will discuss important administrative tasks and information. If there is a system or process for organizing the Local Organizations documents and information, incoming officers should be informed. If there are existing collaborations that new officers will have to manage, they should be informed of the dynamics and routine of that collaboration as well.

#### Goal Setting

After gaining a more in-depth knowledge of their role and responsibility to the Local Organization and implementing the upcoming annual Plan of Action, each individual Board member must set SMART goals for their one year to lead.

These goals should be specific, measurable, attainable, realistic and timely in order to keep the officer accountable. The goals should be written on two different cards. The Local President will keep a copy of each of the officer's goals and use them during Board meetings to keep the team on track to achieve both their shared and individual goals. The officer will also keep a copy for themselves as a reminder of their goals for the year.

## Key Points Explained

### Team Accountability

Local Officers are more than just part of the Local Board of Directors; they will also have the opportunity to lead committees, project teams, community coalitions and other teams throughout the year. Whether an officer is a team leader or just part of one, he/she is responsible for holding the team accountable. Effective accountability can lead to improved communication, increased productivity and better team cohesion.

### Board Responsibility to Organization and Community

When accepting the position of Local President, an officer's role and expectations of the organization change. The officer will become not only responsible for themselves, but also for the entire organization. People will expect an increase in dedication and commitment to the Local Organization from the new Local President, who will be held accountable for the proper performance of their office. In addition to their responsibilities for Local Organization, the officer may also gain responsibilities as a representative of the local community. Therefore, a Local President and the organization they represent must remain accountable and responsible for commitments and collaborations within the community.

### Notes for Trainer | Facilitator

The trainer can facilitate this session and should lead the exercises and activities. However other JCI Officers, both past and present, may present on the following specific topics:

- JCI Board of Directors Responsibilities | Past Local President or National or International Officer
- Review of Organizational Chart + Network | National or International Officer

It is important that the trainer ensures at least one outgoing or past officer for each current position filled for the incoming year on the Local Board of Directors. The trainer should walk around the room to make sure the one-on-one discussions are effectively transferring knowledge.

### Room Layout

- Chairs Only – Grouped in pairs around room

### Materials Needed

- Officer to Officer Knowledge Transfer Worksheet
- Organizational Chart

# RECOMMENDED PROGRAM

## HOW TO BE AN EFFECTIVE LEADER

**Duration:** 90 Minutes

### Purpose

This session will provide incoming officers the opportunity to build their leadership skills by strengthening their capacity and character to motivate others to take action for a common purpose.

### Objectives

- Provide an optimistic understanding of effective leadership to inspire incoming officers to be more effective during their one year to lead.
- Determine the key set of skills required for effective leaders to emerge.
- Identify the skills that will enable them to strengthen their capacity to motivate others to take action for a common purpose.

### Session Outline | Sections

- I. What is Leadership
- II. The Effective L-E-A-D-E-R
- III. Case Study Activities
  - a. Team
  - b. Individual
- IV. Four Imperatives of Effective Leadership
- V. Leaders: They Have, Do, Say... Exercise
- VI. Actions to Build Capacity

### Call to Action

No one is born a great leader, but all people have the potential to become effective leaders. By identifying the characteristics of those who inspire citizens toward a common purpose, JCI leaders too can learn those skills, develop that character and gain new experiences that challenge them to lead.

### Activities Explained

#### Large Group Discussion: What is Leadership

Provide both a definition of leadership and effective leadership. Participants will brainstorm together about what leadership means to them. Thoughts are then shared and written on flip chart paper by the facilitator.

#### Case Study Activities

**Individual:** The purpose of this case is to make each participant take on a leadership role. Each individual is provided with a problem to solve that requires action to be taken while also keeping the team united. Show the slide with the case study and ask each participant to think and express what he/she would do in this case. They should come up with strategies and actions to share with the group ensuring they will work together. Participants should share their ideas and have a short discussion after.

**Team:** The purpose of this case is to make participants take a leadership role. They are provided a problem to solve as a team and must take action to keep the team united.

## RECOMMENDED PROGRAM

### HOW TO BE AN EFFECTIVE LEADER

Participants will review the case study and then work in teams of three to four to discuss and develop a presentation of how they will build trust, clarify purpose, align priorities and unleash talent. What should an officer do to bring out those qualities in members to ensure they have opportunities to test their leadership abilities? After all groups present, conduct a brief large group discussion.

#### Leaders: They Have, Do, Say... Exercise

Split participants into small groups and provide each a flip chart. Instruct them to create a table with the headers, Have, Say and Do on the flip chart. As a group, they will envision a great leader. What qualities does this leader have? What would they do to encourage others to take action? Encourage them to think of leaders they admire and list qualities of that leader in the three columns. Participants will then work individually to identify the characteristics of a great leader that they themselves encompass. Next, take the flip chart and instruct them to identify the characteristics and qualities of leaders they would follow and which qualities they still may need to develop. Write at the top of each column of the new chart, "I have, I need to learn, I need to improve."

#### Actions to Build Capacity

At the conclusion of the session, the facilitator asks all participants to think about what has been shared and discussed and to choose one thing they will start doing right now to improve their leadership skills. Each incoming officer should share their answer with the group.

### Key Points Explained

#### Effective Leadership

There is no right or wrong definition of leadership. There are many definitions depending on the person or culture. Here is one definition that Local Officers will use: "Leadership is a set of skills, processes, behaviors and capabilities that a person needs to motivate and direct others." L-E-A-D-E-R-S collaborate to create a vision and establish a climate for people to reach their highest potential. To do this they effectively: listen, evaluate, assist, discuss, empathize and respond.

To become an effective leader in JCI means utilizing the four essentials of leadership:

1. Build Trust | 2. Clarify Purpose | 3. Align Priorities | 4. Unleash Talent

#### Notes for Trainer | Facilitator

This session is abbreviated from the JCI Effective Leadership Training.

#### Room Layout

- Banquet Style

#### Materials Needed

- JCI Effective Leadership training materials
- Flip chart and markers
- Example Table Set up on Flip Chart
- Individual and Team Case Studies

# RECOMMENDED PROGRAM

## OPEN FORUM

**Duration:** 60 Minutes

### Purpose

This is an opportunity for all incoming officers to ask their predecessors questions they may have about serving as a JCI Officer in the upcoming year. In addition to questions, participants can share their concerns, ideas and hopes for the incoming year. This can also be an opportunity for incoming officers to hear feedback from the general membership.

### Objectives

- Create an environment where participants feel comfortable asking questions and answering them honestly
- Enable open dialogue amongst participants for them to share their concerns, ideas and hopes for the incoming year.

### Session Outline | Sections

- I. Introduction
- II. Ground Rules
- III. Open Forum Session
- IV. Personal Reflection

### Call to Action

Participants are encouraged to continue reflecting on the Local Officer training and what they have learned and how that can be applied during their one year to lead and beyond.

## Activities Explained

### Open Forum

When determining how to organize the forum, first evaluate the strengths, weaknesses, opportunities and threats to the Local Organization and key questions that may arise relating to these areas. Then consider who the participants are. Should the forum include only outgoing and incoming officers or will it also involve past officers, national and international officers and regular JCI members?

### Personal Reflection

Provide all participants with a piece of paper and a pencil. Give them 10 minutes to write down their thoughts and reflections on the training they have received and how they want to apply that knowledge during their one year to lead and beyond. Allow an additional five minutes at the end for any participants that want to share their reflections and the kind of leader they want to be in the incoming year.

### Notes for Trainer | Facilitator

The general membership of the Local Organization can attend this part of the Local Officers training so that they can ask their own questions. This session can be organized in many ways including small focus groups, a large group discussion or a panel discussion featuring high-level officers.

## RECOMMENDED PROGRAM

### POWER CLOSE

**Duration:** 30 Minutes

#### Purpose

This is the final opportunity to instill a feeling of inspiration, empowerment and excitement in participants for the year ahead in which they will lead their organization toward the creation of sustainable impact.

#### Objectives

- To tell the JCI story through a JCI past member or officer
- Inspire incoming leaders by sharing existing knowledge and experience
- End the training on a motivating note, encouraging incoming officers to achieve the JCI Mission during their one year to lead

#### Session Outline | Sections

- I. Introduction of Speaker
- II. Impact Talk
  - a. Potentially include audience Q&A depending on time
- III. Conclusion and Thank You

#### Call to Action

The call to action is for incoming officers to use the knowledge gained during this training program to prepare themselves in achieving their goals and the JCI Mission during their one year to lead.

#### Notes for Trainer | Facilitator

Speakers for JCI Impact Talks can be JCI members, JCI Alumni, or non-members including community leaders. If they are JCI members or Alumni, it is helpful if they have impactful achievements not only within JCI but their professional and community lives. The most important element in identifying a speaker is choosing individuals with a story of impact.

Speakers will be invited to highlight the JCI story through the lens of their personal experience. Every JCI Impact Talk will answer this question, “What was the critical difference in your life that has led you to creating an impact in the lives of others as well as your community?”

The facilitator must ensure a thank you is given to all the important stakeholders that helped ensure a successful Local Officer Training at the program’s end.

The general membership of the Local Organization can attend this part of the local officer training.

#### Room Layout

- Lecture Style

## CONCLUSION

A JCI Local Officer training is only the first step that must be completed in the officer's one year to lead. By ensuring an effective, thorough and comprehensive knowledge transfer from year-to-year, JCI Local Organizations are putting themselves on the path toward a sustainable and impactful future.

Whether developing the Local Officer training per the recommended program or creating something from scratch, the most important thing for organizers to remember is that knowledge transfer involves more than computers and documents. It emphasizes and requires interactions between people. Specific, firm and mission-related knowledge is critical to the sustainability and innovation of organizations, especially those that have high turnover in membership and leadership, which occurs in JCI organizations.

Each organization should look at their capacity, the knowledge and information to be shared and the means to do so when determining how to conduct a Local Officer training and prepare their incoming Board for their one year to lead. Beyond delivering the training itself, ensuring that knowledge has been successfully transferred is an important part of the training process. This is the time where incoming officers have the opportunity to gain full understanding of the current status of the organization, learn about opportunities for the upcoming year and review the roles and responsibilities of their position with the outgoing officers.

To put their organization in a strong position to succeed from year-to-year, the JCI Local Board of Directors should consider developing a plan that not only guides knowledge transfers but also the management and storage of knowledge over time. In a world that is technology driven, JCI organizations can explore the platforms that enable best methods for knowledge transfer, management and storage.

The JCI Local Officers training and transfer of knowledge from outgoing to incoming Boards is critical to the sustainability, innovation and impact of organizations. As the world continues to change at an exponential pace, JCI organizations must learn how to keep up, and the transfer of knowledge is critical to that rapid evolution.

## APPENDIX

### OFFICER KNOWLEDGE TRANSFER CHECKLIST

#### JCI Knowledge Transfer Checklist for Local Officers

Local leaders of JCI often acquire substantial information regarding the organization's operations and relations with the community. Their knowledge and experience is of immense value to the organization in preparation for the upcoming year as it transitions to new leadership and undertakes decision-making for the future of the organization. To ensure an orderly transition of responsibilities, use this knowledge transfer checklist as a guide

- Introduce yourself, your JCI experience and important contact information.  
*Outgoing and incoming officers must have a strong relationship to ensure continuity.*
- Share the official responsibilities of your position.  
*Explain your responsibilities according to the JCI Constitution and during your one year to lead.*
- Identify the resources and tools needed to fulfill your responsibilities.  
*Provide the resources you use in your position and how to use them.*
- Give introductions to partners and vendors and their point of contacts.  
*Connect to key points of contact and provide background on the relationship.*
- Connect key stakeholders both internally and externally.  
*From alumni and senators to potential donors and sponsors, keep these individuals engaged.*
- Handover access of important accounts, documents and systems.  
*From your financial accounts, to how you store historical information, provide explanation.*
- Instruct on use and management of equipment and facilities.  
*From office and storage space to items like gavels, instruct on how to manage such materials.*
- Inform of ongoing projects and their current status.  
*For projects that continue from year-to-year, share ongoing tasks, planning details and information.*
- Contribute best practices and lessons learned.  
*Share best practices for completing your responsibilities and achieving the JCI Mission.*
- Share potential risks or obstacles your successor could experience.  
*Based on your experiences share potential challenges and possible solutions to overcome them.*
- Communicate your ability to support your successor throughout their one year to lead.  
*Successors will look for you to support in their one year to lead so establish your ability to support early on.*



## APPENDIX

### WHO DONE IT? WORKSHEET EXAMPLE

#### Who Done It! Icebreaker Instructions

Instruct participants to go around the room and introduce themselves with other participants. When meeting, they will work to identify if they have any of the skills or experiences listed. If they have, have them sign the worksheet with their position for the incoming year. At the end of the activity, go around and have participants share interesting facts they learned about their fellow Board of Directors that could be useful throughout the year.

Traveled to every continent (except Antarctica)	Visited every city where there is a JCI Local Organization	Been to a JCI World Congress	Spoken publicly in front of more than 100 people	Can speak more than two languages
Served as a JCI Local President	Owens their own business	Sits on the board of another civil society organization	Visited the JCI World Headquarters in St. Louis, MO, USA	Participated in a JCI Active Citizen Framework Project
Has committed to the Peace is Possible campaign <small>(www.peaceispossible.cc)</small>	Has been a local project director	Trained JCI Achieve	Donated to the JCI Foundation	Has read the 2014–2018 JCI Strategic Plan
Is aware of the Global Goals for Sustainable Development	Attended a JCI Global Partnership Summit	Been involved in creating an annual Plan of Action	Participated in a JCI Area Conference	Managed a partnership either inside or outside JCI
Organized a fundraiser	Is a JCI Senator	Trained JCI Impact	Planned and executed an event	Secured a sponsorship from a company

APPENDIX  
WHO DONE IT? WORKSHEET

Who Done It!  
Icebreaker Instructions

Instruct participants to go around the room and introduce themselves with other participants. When meeting, they will work to identify if they have any of the skills or experiences listed. If they have, have them sign the worksheet with their position for the incoming year as well. At the end of the activity, go around and have participants share interesting facts they learned about their fellow Board of Directors that could be useful throughout the year.


# APPENDIX

## ORGANIZATIONAL STRUCTURE



JCI is made up of individual **JCI members** that are active citizens in their community. These are ordinary individuals taking action to achieve extraordinary impact.



Each JCI member is affiliated to a **JCI Local Organization** that provides development opportunities by taking action to address their community's greatest challenges.



Each JCI Local Organization is affiliated to a **JCI National Organization**. The nearly 120 JCI National Organizations unite to form the Junior Chamber International network.



JCI is lead by **International Officers**. Elected or appointed to represent the organization worldwide, these officers inspire active citizenship amongst JCI's global network.

### JCI World Headquarters



JCI World Headquarters, located in St. Louis, MO, USA provides services and support to JCI Officers, organizations and members to achieve the JCI Mission, from creating tools, to organizing events, to providing administrative support.

### JCI Board of Directors



The JCI Board of Directors consists of the JCI World President, four Executive Vice Presidents (one for each area) and 17 JCI Vice Presidents. Each JCI National Organization is assigned a JCI Vice President along with a JCI Executive Vice President who will support them during their year of leadership.



### JCI International Officers

JCI's global leadership is made up of both elected officials called the JCI Board of Directors and appointed officials assigned to various committees that support JCI programs and activities. Together they lead in the implementation of the current JCI Plan of Action and JCI Strategic Plan.

### JCI Appointed Committees

From year to year committees will be appointed to support the implementation of the Plan of Action for that year. While committees change from year to year, we do regularly have the following:



The Partnerships Committee supports JCI partnerships by promoting collaborative campaigns and connecting JCI to potential partners.



The Sponsorship Committee supports JCI's fund development by promoting the JCI Foundation and identifying new funding opportunities.



There are four Growth and Development Councils to help JCI establish itself in new communities and countries to expand our reach and impact.



The skills development committee identifies and develops new opportunities for young people to develop skills to become active citizens.



The strategic plan committee is appointed every 3-5 years to identify long-term goals to guide the organization to achieve its Mission in the future.

### Additional JCI Stakeholders



The JCI Foundation empowers JCI members to financially invest in the future of JCI. JCI organizations can apply for grants for initiatives.



The JCI Senate recognizes the outstanding members worldwide. JCI Senators are lifetime members that stay connected to support JCI.



At all levels, JCI partners with like-minded stakeholders from all sectors to maximize the impact of grassroots actions.



The JCI Alumni program allows former JCI members to reconnect and give back to the organization that impacted their lives.

## APPENDIX

### ORGANIZATIONAL HISTORY

#### The Beginning of a Movement

The JCI Movement began in 1915 by one man, with one vision and a passion for positive change. Henry Giessenbier Jr. lived during a time of growth and expansion and saw the need for youth to develop their skills in order to address the civic challenges. This vision included igniting a movement that worked toward the establishment of a permanent and everlasting world peace. The first JCI Local Organization was founded on October 13, 1915 at the Mission Inn in St. Louis, USA, when 32 men joined together to form the Young Men's Progressive Association (YMPCA). The YMPCA sought to offer young active citizens the unique opportunity to share their voice and engage with community members and officials to address community challenges and create sustainable impact. In nearly five months, the organization grew from 32 to 750 members. Official recognition of the organization was granted on November 30, 1915, when it was enrolled as a member of the Mayor's Conference of Civic Organizations. In 1916, the YMPCA became known as the Junior Citizens and soon after it changed again to the Junior Chamber of Commerce.

#### Junior Chamber Spreads Across the Nation

The 1920's brought great change for the JCI Movement as it went from local to national status. The first convention of the US Junior Chamber occurred in St. Louis, USA in 1920 with 30 cities present. Projects were now developed both locally and nationally to expand the impact. In 1926, the US Junior Chamber pursued the expansion of aviation in the United States by working toward establishing airports throughout the country with member Charles A. Lindbergh, who helped introduce the age of commercial aviation. JCI grassroots initiatives continued with the Get-Out-The-Vote campaign in 1926 in which the US Junior Chamber became the first national organization to conduct a systematic campaign to educate active citizens of their civil duty to vote. As a result, 12 million more individuals voted in the 1928 election than in 1924. Other projects, including several successful campaigns aimed at increasing road safety, showed the impact of the JCI Movement growing in more and more communities across the United States.

#### Expanding Internationally

Months prior to the attack on Pearl Harbor, the US Junior Chamber became the first young men's group to back the draft principal and during that time 85% of the organization's membership entered into the military. In the midst of World War II, the time came for the US Junior Chamber to take the organization to an international standing. It was on December 11, 1944 with representatives from the United States, Costa Rica, El Salvador, Guatemala, Honduras, Mexico, Nicaragua and Panama present that the movement was established internationally during the Inter-American Congress in Mexico City. With their international presence established, the first JCI Congress took place in Panama City, Panama in 1946. It was the work of the US Junior Chamber that influenced World War II Veteran Artemio L. Vergel de Dios from Manila, Philippines to initiate the first JCI Local Organization in Asia in 1948. The organization's rapid international growth demonstrated the desire to build peaceful relationships across borders.

#### Collaboration for a Better World

The 1950's were a time of change but also most importantly a time of reconnecting to the roots and values of the organization. In 1954, the United Nations Economic and Social Council (ECOSOC) granted JCI Special Consultative status, officially defining the supportive relationship between JCI and the UN. With the understanding that the brotherhood of man transcends the sovereignty of nations, a core value of the organization, JCI was the first international organization in the post-war world to recognize Japan as its own country. Moreover, American soldiers and JCI members who remained in Japan after the war helped rebuild the country and introduce democracy. Further exemplifying the value of brotherhood, the first international campaign launched in 1954. Operation Brotherhood was developed to support refugees fleeing communism in Vietnam. The campaign included large-scale fundraising efforts that raised US \$1 million, assisted more than 730,000 individuals through health and wellness programs and created 350 special villages for refugees.

## APPENDIX

### ORGANIZATIONAL HISTORY

#### Breaking Social Barriers Globally

As more countries gained their independence, JCI rapidly expanded in Africa and Latin America. While citizens gained new freedoms, opportunities for women were increasing. Throughout the 1970's, membership growth among women soared and in 1971 the first female National President was elected in Nepal. JCI continued this trend of breaking social barriers in 1974 by establishing the first multiracial organization to receive governmental permission in South Africa. During this time of expansion and growth, JCI communicated their stories of impact by issuing a multi-language publication across the globe to nearly 400,000 members. After several decades since the organization became international, JCI demonstrated its ability to develop leaders as JCI alumni moved on to assume leadership roles in government, businesses and civil societies in communities across the world.

#### Peaceful Solutions for All People

Starting in the 1980's, organizational themes focused heavily on equality, internationalism and world peace in response to civil conflicts, assassination attempts and acts of terror. The Ten Outstanding Young Persons of the World (JCI TOYP) program was launched internationally in 1983 to recognize socially responsible young active citizens to inspire the next generation of young leaders. Through this program, JCI has recognized people for their accomplishments in areas such as business, economic and entrepreneurial accomplishment, medical innovation and contributions to children, peace and human rights. Throughout the 1990's, JCI members around the world took action to support marginalized groups such as children, people with disabilities and senior citizens. JCI participated in drafting the Declaration of the Rights of the Child, a list of 54 articles created by the UN General Assembly, addressing basic human rights to which children everywhere are entitled. To provide equal opportunities, a variety of projects constructed hospitals, camps for disabled youth and senior housing facilities. In the United States, members lobbied for legislation to mandate public accessibility for the disabled.

#### Impact in the New Millennium

The early 2000's reinvigorated the sense of active citizenship and grassroots initiatives throughout the organization; members refocused projects and efforts around the JCI Mission. In 2004, JCI committed to advance the Millennium Development Goals created by the United Nations. This set of eight global development goals ranged from eradicating extreme hunger and poverty to combating HIV/AIDS and malaria. Through 2015, the target deadline, JCI members continued to organize projects focused on advancing these goals by taking action at the local level. To increase the quantity of projects that result in sustainable solutions, the General Assembly of the 2010 JCI World Congress adopted the JCI Active Citizen Framework, a roadmap of actionable, results-driven steps to produce sustainable impact. The JCI Active Citizen Framework has helped drive projects by first conducting community needs analysis, then collaborating with stakeholders to formulate a sustainable solution and take action.

#### 2015 and Beyond

As JCI celebrated the 100th Anniversary of the JCI Movement, the moment presented itself for the organization to reflect on the impact created over the last 100 years. However, JCI members did more than reflect on the past, but began working toward a better future. In July 2015, in partnership with the UN Millennium Campaign, JCI launched the Global Youth Empowerment Fund to empower young people around the globe to impact their communities by investing in grassroots projects. In September 2015, as the Millennium Development Goals reached their target deadline, the UN General Assembly adopted a 17-point plan to end poverty, combat climate change and fight injustice and inequality. Dedicated to creating a better world, JCI signed the Kanazawa Declaration during the 2015 JCI World Congress, committing the organization to advancing the Global Goals. Through the organization's mission and vision, JCI continues to discover and celebrate the unsung heroes of its time on its journey to be the organization that unites all sectors of society to create sustainable change.

JCI Knowledge Transfer Workbook

JCI local leaders often acquire substantial information regarding the organization’s operations and relations with the community. Their knowledge and experience is of immense value to the organization as it prepares for the upcoming year, transitioning to new leadership and making decisions for the future of the organization.

To ensure an orderly transfer of responsibilities and accountability, please complete the following form.

1. Knowledge givers, fill in your information:	
Full name:	
JCI Local Organization:	
Position (if applicable)	
Years with JCI:	
Email:	
Phone:	

2. To whom do you intend this knowledge to be transferred?	
Full name:	
Position:	
Date of Official Handover:	
Email:	
Phone:	

3. List the normal responsibilities you conducted within the leadership position of your JCI Local Organization.
<p><i>As JCI _____ my responsibilities included:</i></p> <ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>

4. List the normal responsibilities you conducted within the leadership position of your JCI Local Organization.		
Resource Name	Location	How to use the resources

**APPENDIX**  
**KNOWLEDGE TRANSFER WORKBOOK**

5. List relationships with external organizations, which require regular meetings, interactions and updates in order to fulfill the responsibilities of your position.

Organization name	Describe the relationship	Provide contact information (email, phone, address)

6. List relationships with external organizations, which require regular meetings, interactions and updates in order to fulfill the responsibilities of your position.

Contact Name	Organization and Title	Describe Relationship	Potential Introduction Date

7. Please list any historical or reference documents, if any, in your possession. (i.e. Non-profit registration with local government or membership contact list). Please share these documents with your successor.

Document Name	Description	When and/or why is it needed?

8. What equipment have you been tasked to use and/or keep track of? Where is the equipment now? Are there any instructions those using the equipment need to follow?

Document Name	Description	When and/or why is it needed?

## APPENDIX

### KNOWLEDGE TRANSFER WORKBOOK

9. Using the attached sheet, "Project Status Report Template," provide a list of all projects, ongoing tasks, tips, information and other open items on which you are currently working.

10. Please list the best practices you've experienced in not only completing your responsibilities but achieving the JCI Mission and why you think these practices worked well.

- 
- 
- 
- 
- 
- 

11. What risks or obstacles might your successor experience when trying to complete their responsibilities. What are possible solutions to overcome these obstacles?

Risks	Solutions

12. Is there any other information not requested on this form that you think would be helpful for the incoming leadership to know? If yes, please explain.

13. Are you able to provide further support to the incoming officer elected for this position during the initial transition period to ensure a full transfer of knowledge?

YES

NO

14. Is there any other information not requested on this form that you think would be helpful for the incoming leadership to know? If yes, please provide.



## APPENDIX

### KNOWLEDGE TRANSFER PROJECT STATUS REPORT TEMPLATE

NAME OF PROJECT:	
CURRENT PROJECT STATUS	
ROLE IN PROJECT	
ASSIGNED TASKS AND DEADLINE	
PROJECT STAKEHOLDER INFORMATION	
SPECIAL CONCERNS (BUDGET, TIMELINE, ETC.)	

NAME OF PROJECT:	
CURRENT PROJECT STATUS	
ROLE IN PROJECT	
ASSIGNED TASKS AND DEADLINE	
PROJECT STAKEHOLDER INFORMATION	
SPECIAL CONCERNS (BUDGET, TIMELINE, ETC.)	