

Chairman's Planning Guide (CPG)

Chapter Name _____ Chapter Number _____

State Name _____ State Number _____

Project Name _____

CPG Category _____

Supervising Chapter Officer _____

Chairperson's Name _____

Address _____

City _____ State _____ Zip Code _____

Home Phone _____ Business Phone _____

Fax _____ Email Address _____

Date Approved by Board _____

Date Approved by Chapter _____

Date Final Report Approved _____

CHAIRMAN'S PLANNING GUIDE

Project Name: xx

PLANNING

- 1. Primary purpose.** What is the one reason you want to successfully run this project? Be sure to write only ONE reason!

The primary purpose for this project is xx

- 2. Give a brief description of the proposed project and background information.** Follow this with a listing of the specific and measurable goals to be accomplished by this project.

Summarize the concept of the proposed project. Make sure that you state Who, What (or How), When, Where, and Why. Explain how this proposed project relates to the chapter's objective, priorities, and goals. Your Vice President should be able to help you with this. Give a brief history of the project if applicable. Be sure to describe where the idea came from, how it was determined that this project was needed. Try to keep the description to one or two paragraphs.

The goals for this project are as follows:

Make sure your goals are quantifiable, measurable. Example: To involve 20 Seattle Jaycees.

A goal like "To have fun" is not measurable so you will not know if it is ever achieved. Keep in mind "How will you determine if this goal was actually met, how will you measure it?" Surveys are very helpful in quantifying subjective types of goals, as well as ones that measure change, e.g. whether participant learned anything, changed their behavior, etc. TIP: The first goal must match the primary purpose.

GOAL 1:

GOAL 2:

GOAL 3:

GOAL 4:

- 3. What are the specific manpower assignments?**

Document proposed involvement for both Jaycees and non-Jaycees. At a minimum, you will have 3 manpower assignments: You (the Chairman), your Vice President, and the President. If you have committee members, list their names too. Include job title (Chairman, President, Manpower Committee, etc.) and contact information (address, e-mail and phone number). List the duties and responsibilities for each person. For manpower assignments where a specific person has not yet been selected, leave the name and contact information blank (or indicate "to be determined") but include the duties and responsibilities. TIP: List duties in chronological order.

Chairperson

Name:

Address:

Phone:

4. What specific materials, supplies, and resources will be required?

(List all materials, supplies, and/or resources that will be needed to successfully complete this project. Include resources that are owned, donated, and purchased. Provide detailed contact information (name of business, contact person, address, telephone numbers, etc.) for any resource that is donated or purchased. Try to think of everything, it will help you avoid last minute problems. TIP: Don't forget the little things like tape to hang up a poster or pens for filling out raffle tickets.

Give a value for all items, both planned to purchase, and donated. Use the donated items cost sheet for help with donated items. If it is an unusual item, use your best guess. What would it cost if you had to buy/rent/create the item?

Set up a table with the following headings to help organize this information. It will come in handy when you get to step #6 (the BUDGET)!

<u>Material or Supply & Quantity</u>	<u>Member Responsible for Obtaining</u>	<u>Date Needed</u>	<u>Is Resource Donated, Owned or Purchased</u>	<u>Cost/ Value</u>
----------------------------------------------	---------------------------------------------	------------------------	----------------------------------------------------	------------------------

5. Describe the potential problems and solutions to successfully complete this project.

Anticipate REALISTIC potential problems and develop back-up plans or alternate solutions to each problem. For best results, consider problems in the planning, training, personnel management, communications and financial management areas. If you have multiple solutions to a potential problem, list all of them.

TIP: Include solutions that can be realistically accomplished. For example: If your solution is to schedule a "rain date" for an outdoor event, make sure a "rain date" is even possible. How will you advertise the change? Will the location be available if you change the date?

EXAMPLES:

- Potential Problem :** Lack of attendance.
Solution: Use chapter communications tools: phone calling committee, newsletter, fliers, etc. to notify the membership and prospective members.
- Potential Problem:** Too few committee members to accomplish necessary tasks.
Solution: Project chair should attend as many chapter events (GM, M6, etc.) as possible to recruit committee members face to face. Start promotion and planning in plenty of time. Use chapter communication tools.
- Potential Problem:**
Solution:
- Potential Problem:**
Solution:
- Potential Problem:**
Solution:

6. Complete a Proposed Budget indicating all anticipated income and expense. (format below)

Keeping project goals in mind, refer to the list of materials, supplies and resources (Question 4), along with the proposed action steps, to determine income and expenses. Include the value of donated items as both income and

CHANGES OR RECOMMENDATIONS

10. Give specific and measurable results for each goal established. Describe the impact of the project on the chapter, individual members and the community. Evaluate your primary purpose.

Restate your primary purpose and describe just how well the project met it. Then restate each of your goals and evaluate them here. You can just copy and paste the primary purpose and goals from question #2 here, then add a result line. Results can be evaluated by percentage. For example, if one goal was to have 25 people attend, and 50 actually attended, you can say you met that goal by 200%.

Primary Purpose:

Result:

Goal 1:

Result:

Goal 2:

Result:

Goal 3:

Result:

Goal 4:

Result:

Use the areas below to describe the impact that this project had on the individual, the chapter, and the community. Use this opportunity to reach the reader as to why this project should (should not) be run again. Only area(s) of impact need to be discussed. This is your time to brag! Be descriptive and POSITIVE in your impact statement(s). This is where you will show how the project was a success for the chapter, the community and you, as the chairperson, or for an individual involved in the project. Let this area tell about the success and the benefits of the project. There are some, or you wouldn't have gotten this far with this project. TIP: In the Individual Impact statement, state at least one thing that you learned. For example, "I learned how to ask for help" or "I learned how to speak up".

INDIVIDUAL: Individuals involved in this project benefited by...

CHAPTER: This project benefited the chapter by...

COMMUNITY: This project benefited the community by...

Complete a final budget for the project. Format below.

Project Name **Proposed Budget** (question #6)

INCOME:	<u>PROPOSED</u>
Appropriation from chapter	\$0.00
Value of donated items (list)	
.....	\$0.00
.....	\$0.00
.....	\$0.00
.....	\$0.00
.....	\$0.00
Other sources of income (list)	
.....	\$0.00
.....	\$0.00
.....	\$0.00
.....	\$0.00
.....	\$0.00
.....	\$0.00
.....	\$0.00
TOTAL INCOME.....	\$0.00

EXPENSES:	<u>PROPOSED</u>
Value of donated items (list)	
.....	\$0.00
.....	\$0.00
.....	\$0.00
.....	\$0.00
.....	\$0.00
Other expenses (list)	
.....	\$0.00
.....	\$0.00
.....	\$0.00
.....	\$0.00
.....	\$0.00
.....	\$0.00
.....	\$0.00
.....	\$0.00
Appropriation from chapter	\$0.00
Return to chapter (profit)	\$0.00
TOTAL EXPENSES.....	\$0.00

Project Name **Final Budget Sheet/Financial Statement** (question #10)

INCOME:	<u>PROPOSED</u>	<u>ACTUAL</u>
Appropriation from chapter	\$.00	\$.00
Value of donated items (list)		
.....	\$.00	\$.00
.....	\$.00	\$.00
.....	\$.00	\$.00
.....	\$.00	\$.00
.....	\$.00	\$.00
Other sources of income (list)		
.....	\$.00	\$.00
.....	\$.00	\$.00
.....	\$.00	\$.00
.....	\$.00	\$.00
.....	\$.00	\$.00
.....	\$.00	\$.00
TOTAL INCOME	\$.00	\$.00
EXPENSES:	<u>PROPOSED</u>	<u>ACTUAL</u>
Value of donated items (list)		
.....	\$.00	\$.00
.....	\$.00	\$.00
.....	\$.00	\$.00
.....	\$.00	\$.00
.....	\$.00	\$.00
Other expenses (list)		
.....	\$.00	\$.00
.....	\$.00	\$.00
.....	\$.00	\$.00
.....	\$.00	\$.00
.....	\$.00	\$.00
.....	\$.00	\$.00
.....	\$.00	\$.00
Appropriation from chapter	\$.00	\$.00
Return to chapter (profit)	\$.00	\$.00
TOTAL EXPENSES	\$.00	\$.00