

# CHAIRMAN'S PLANNING GUIDE

Gateway

Chapter Name

10

Chapter #

Illinois

State Name

5

State Number

[Enter Chair-Person's Name]

Chairman's Name

[Enter the Project Name]

Project Name

[Enter Chairman's Address]

Chairman's Mailing Address

[Enter the CPG Category]

CPG Category

[Enter the Chairman's Business Phone]

Business Phone

[Enter the Chairman's Home Phone]

Home Phone

[Enter the Chairman's Email Address]

Email Address

[Enter the Supervising Chapter Officer]

Supervising Chapter Officer

PROPER USE OF THIS GUIDE: Good advanced planning and record-keeping will assure success. Use this guide in planning and conducting the project by answering each of the following questions. The form should be used as a cover sheet to your Chairman's Planning Guide.

## PLANNING

1. Primary Purpose. (What is the one reason you want to successfully run this project?)
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. (Example: To involve 25 Jaycees.)
3. What are the specific manpower assignments? (Show names and duties.)
4. What specific materials, supplies and resources will be required?
5. Describe the potential problems and solutions to successfully complete this project.
6. Complete a Proposed Budget indicating all anticipated income and expense.
7. List the specific steps to bring this project to a successful completion showing planned dates for each step.

## IMPLEMENTATION AND EVALUATION

8. Record any revision of the original plan.
9. What changes or recommendations do you have for a future chairman?
10. Give specific and measurable results for each goal established? Describe the impact of this project on the chapter, individual members and the community.

\*Upon completion of the project, complete the actual section of the Financial Statement

[Enter Date Initial CPG was approved]

Date Approved by Board/ by Chapter

[Enter the Date that the final was approved]

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! (Who, What, Why, When and Where)

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.

*Briefly describe what this project is all about. Essentially restate the primary purpose with more detail (the Hows).*

*Provide a background on the project; how did you come up with the project, how long has your chapter been running this project, etc...*

*Reference to the Chapter Plan - AREA of OPPORTUNITY*

This project falls under the (Chapter Name) Jaycees (YEAR) Chapter Plan, (**Community, Individual, International, Business or Management**) Area Of Opportunity, Goals: (To Run XXXXX Projects during the year)

### **The goals for this project are as follows:**

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

*A goal like "To have fun" won't work however. 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.*

*Goal 1 should be to restate the primary purpose (eg. To educate our membership on some basic Jaycee Administrative duties, by providing them with training at our January 9, 2001 General Membership Meeting). The last goal should be a Membership Recruitment goal.*

**GOAL 1:**

**GOAL 2:**

**GOAL 3:**

**GOAL 4:**

### 3. What are the specific manpower assignments?

Show here that there are as many people involved as possible. Jaycee involvement is a good thing! Please put addresses & phone numbers in whenever possible. Non-Jaycee Manpower are the important contacts that are made from the project. These are essential for anyone who runs this project in future years. Additional Manpower is a general list of how many bodies it's going to take to make the project successful.

#### **Jaycee Manpower**

##### **President**

**Name:**  
**Address:**  
**Phone:**  
**Duties:**

##### **Supervising Officer** (This should be the area Vice President.)

**Name:**  
**Address:**  
**Phone:**  
**Duties:**

##### **Chairperson**

**Name:**  
**Address:**  
**Phone:**  
**Duties:**

Under Members below, list out the duties that will need to be handled, even if you don't have actual titles. Possible titles are: Co-Chair, Committee Member, Newsletter Editor, WEB Master, PR Director, etc.) Keep in mind that if the project requires ANY money to go through the chapter, then you must also list your Treasurer.

##### **Member 1**

**Name:**  
**Address:**  
**Phone:**  
**Duties:**

##### **Member 2**

**Name:**  
**Address:**  
**Phone:**  
**Duties:**

#### **Non-Jaycee Manpower**

Only list those that make sense to the project. Any contacts that are required to run this project successfully. This could include Contacts used to generate donations from, contacts from the local media that handle your PR, etc...

##### **Title of Person**

**Name:**

**Address:**  
**Phone:**  
**Duties:**

**Title of Person**

**Name:**  
**Address:**  
**Phone:**  
**Duties:**

**Title of Person**

**Name:**  
**Address:**  
**Phone:**  
**Duties:**

**Additional Manpower**

*What kind of manpower do you need to accomplish this project? How many people do you need, to do what and when?*

Number of members	Job Description, Date/Place/Time Needed

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

*(Materials, supplies, and/or resources that will be needed to accomplish this project include both donated and purchased supplies. Try to think of everything, it will help you avoid last minute problems. Keep in mind that every item listed in these tables MUST appear in your Financial Section.*

**NOTE: Don't go overboard**

Jaycee Materials, Supplies, and/or Resources			
<i>Materials</i>	<i>Quantity</i>	<i>Responsible Party</i>	<i>Date Needed</i>

Non-Jaycee Materials, Supplies, and/or Resources			
<i>Materials</i>	<i>Quantity</i>	<i>Responsible Party</i>	<i>Date Needed</i>


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

*Sort these in the areas of Planning, Training, Communications, Personnel Management and Financial Management. Have a BACKUP PLAN*

*EXAMPLES:*

**PLANNING:**

**Potential Problem:** Poor weather.  
**Solution:** Plan possible alternate poor weather date, or alternate locations.

**PERSONNEL MANAGEMENT**

**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:**  
**Solution:**

**Potential Problem:**  
**Solution:**

**6. Complete a Proposed Budget indicating all anticipated income and expense.**

*Look back at the items you listed in question # 4 and include them. Itemize your budget as much as possible. This will help your committee members, supervising officer and staff members to troubleshoot, to make sure that you haven't left things out. Brainstorming and itemizing every anticipated budget item will help you avoid budget overruns later. The grand total under income should match the grand total under expenses. Budget chart provided further down. Please use the chart provided.*

**7. List the specific steps to bring this project to a successful completion showing planned dates for each step.**

*Don't forget to include the dates you begin to write your CPG questions #1-7, get approval for, and complete your CPG questions #8-10. Put the dates you came up with the idea for the project, and how it all came about. You don't have to be totally accurate with these dates, that's what question #8 is for! Do try to be realistic though, and you'll be better prepared for your project.*





**9. What changes or recommendations do you have for a future chairman?**

*Take this opportunity to discuss the good, the bad and the ugly . . . Remember that every project has many sides to it. Running projects and completing the paperwork is not just a waste of time, but an opportunity for growth and development of leadership skills. Future project chairs will be able to use your planning guide to help them run a successful project. Help them learn from your successes and your mistakes.*

CHANGES OR RECOMMENDATIONS

**10. Give specific and measurable results for each goal established.** Describe the impact of the this 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, then paste your primary purpose, and goals from questions #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:**

**Goal 5:**

**Result:**

*Use the areas below to describe the impact that this project had on the individual, the chapter, and the community. 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.*

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

**CHAPTER:** This project benefited the chapter by

**COMMUNITY:** This project benefited the chapter by

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

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**INCOME:**

**PROPOSED**

<b>Appropriation from Chapter</b> .....	\$0.00
<b>Donated Items (list)</b>	
Donated Item 1 .....	\$0.00
Donated Item 2 .....	\$0.00
<b>Items on Hand (list)</b>	
.....	\$0.00
<b>Other Sources of Income (list)</b>	
.....	\$0.00
.....	\$0.00
.....	\$0.00
<b>TOTAL INCOME</b> .....	<b>\$0.00</b>

**EXPENSES:**

**PROPOSED**

<b>Value of Donated Items</b> .....	\$0.00
<b>Value of Items on Hand</b> .....	\$0.00
<b>Other Expenses (list)</b>	
.....	\$0.00
.....	\$0.00
.....	\$0.00
.....	\$0.00
.....	\$0.00
<b>Return Appropriation from Chapter</b> .....	\$0.00
<b>Return to Chapter (profit)</b> .....	\$0.00
<b>TOTAL EXPENSES</b> .....	<b>\$0.00</b>

Project Name **Budget Sheet/Financial Statement**

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<b>INCOME:</b>	<b><u>PROPOSED</u></b>	<b><u>ACTUAL</u></b>
Appropriation from Chapter .....	\$0.00.....	\$0.00
<b>Donated Items (list)</b>		
.....	\$0.00.....	\$0.00
.....	\$0.00.....	\$0.00
<b>Items on Hand (list)</b>		
.....	\$0.00.....	\$0.00
.....	\$0.00.....	\$0.00
<b>Other Sources of Income (list)</b>		
.....	\$0.00.....	\$0.00
.....	\$0.00.....	\$0.00
.....	\$0.00.....	\$0.00
<b>TOTAL INCOME</b>	<b>\$0.00</b>	<b>\$0.00</b>

<b>EXPENSES:</b>	<b><u>PROPOSED</u></b>	<b><u>ACTUAL</u></b>
Value of Donated Items .....	\$0.00.....	\$0.00
Value of Items on Hand.....	\$0.00.....	\$0.00
<b>Other Expenses (list)</b>		
.....	\$0.00.....	\$0.00
.....	\$0.00.....	\$0.00
.....	\$0.00.....	\$0.00
Return Appropriation from Chapter.....	\$0.00.....	\$0.00
Return to Chapter (profit) .....	\$0.00.....	\$0.00
<b>TOTAL EXPENSES</b>	<b>\$0.00</b>	<b>\$0.00</b>