

# Unlocking the mystery of CPG's



## Chairman's Planning Guides

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Everyone has ideas. The key to impacting your members and your community is by putting those ideas into practice. The Jaycees use a **Chairman's Planning Guide (CPG)** to turn our member's ideas into reality. A CPG is a business plan. It covers every aspect of running a project. This includes goal setting, manpower assignments, budgeting, devising a time line and careful evaluation of the project's success.

The CPG is the one tool that we have that other organizations do not. It was devised By Jaycees, For Jaycees. This planning guide is your resource for running a successful project.

Being a Jaycee, we are lucky enough to have review procedures in place to recognize chair people for their hard work. This is accomplished through our CPG judging and awards program. Keep in mind that a CPG should not just be written to submit to the state or national organization to be recognized. The CPG is written to aid the project chairperson in planning a successful project. When done correctly, the CPG process will develop the leadership skills of your chapter members. If the CPG demonstrates that the project has impacted the chapter, its members and the community, then it may be considered as a potential award winner.

## Tab 1: The CPG: Chairman's Planning Guide

### Question 1: What is the primary purpose of running this project?

A brief statement giving the one reason the chapter wants to conduct this project.

The purpose should relate to the Area of Opportunity that the project is submitted under. Be as general as possible and keep it contained to one sentence. It is important that only ONE primary purpose be listed.

#### DON'TS

- We want to have fun at the social.
- The purpose is to recruit 10 new members and raise \$2000 for charity.
- We are going to hold a social for chapter members.

#### DO'S

- To recruit members through hosting an M-night.
- To raise funds for Special Olympics.
- The primary purpose is to serve food at a local soup kitchen.
- Our purpose is to promote the chapter in the local media.
- The chapter wants to run this project for the purpose of raising \$10,000 for Big Brothers and Big Sisters.
- The primary purpose is to raise money for Muscular Dystrophy Association by holding a roadblock.

### Question 2. Give a Brief Description of the proposed project and Background information.

Summarize the concept of the proposed project — the who, what, when, where or how that provided the idea — and briefly describe the desired results.

List how the project fits into the overall "big picture" of your chapter's activities. Explain how this proposed project relates to the chapter's objective, priorities, and goals as listed in your chapter plan.

Follow this with a listing of the specific and measurable goals to be accomplished by this project. Project goals must be SPECIFIC, MEASURABLE, and ATTAINABLE. There is no minimum or maximum number of goals a project may have. Questions three through seven are the plan of how to attain these goals. Remember that successful achievement of project goals will have a positive influence on achievement of the primary purpose. The first goal should match the primary purpose.

### Example 1: Chapter Plan CPG: *DO*

This project encompasses the activities involved in creating the Chapter Plan of Action for the year, including developing the following:

Mission and Vision Membership Plan    Organizational Chart    Community Survey  
Prioritizing each of Area of Opportunities    Member Survey

All of these activities support the development of the Chapter Plan through programming in each area of opportunity.

Two planning sessions will be held. The first session will be Jan. 13 where the above activities will be introduced and explained. The strengths and weaknesses of each area of Opportunity will be reviewed by the entire board and led by the applicable VP for input from the Board. The VP's will then complete the draft plan and budget, and present to the entire board on Jan. 28. The secretary will then compile the reports from each VP and submit for approval at the Feb. General Membership Meeting. The secretary will note any revisions by the general membership and the final plan printed. These sessions and activities arise from the need to have a written, cohesive plan of action for the chapter so as to meet our mission, vision, and goals. This project relates to Priority 2, Management Area of Opportunity; Goal 3 "Submit the Chapter Plan for Chapter's Approval by 2/4/03"; project 1: Chapter Planning.

Goal 1: Have 85% of the Board in attendance at both planning sessions.

Goal 2: Complete the Member Survey by Jan. 13.

Goal 3: Complete the Community Survey by Jan. 13.

Goal 4: Successfully complete the Membership plan by Jan. 28.

Goal 5: General Membership approval of the Chapter Plan by Feb. 4.

### Version 2: Don't: (Not enough information for next year's chairman)

The Jaycees have competed in several state competitions in the last several years. We want more competitors. The program is devised to stimulate interest in judging and competing. Competitors will be trained about each competition. The chapter will register competitors at the state convention each trimester.

This project fits in the Chapter Plan under Priority 3: Individual Area of Opportunity, Competitors and Judges Program.

Goal 1: Have 2 members involved in the Competitors program.

Goal 2: Competitors to attend at least one training session prior to competing in the All State convention.

### Question 3: What are the Specific Manpower Assignments

Document proposed involvement, both member and non-member. List each individual along with his or her specific duties and responsibilities. For manpower assignments where a specific person(s) has not yet been selected, list the specific responsibilities, talents, skills, knowledge, or abilities that person(s) will need to possess.

**Designate the following activities for every project:**

- |  |  |
|--|--|
| <input type="checkbox"/> Who will write the CPG                              | <input type="checkbox"/> Who will secure location                          |
| <input type="checkbox"/> Who will secure camera and film and take photos     | <input type="checkbox"/> Who will report on project at membership meetings |
| <input type="checkbox"/> Who will report on project at board meetings        | <input type="checkbox"/> Who will make sign-in sheet                       |
| <input type="checkbox"/> Who will recruit members                            | <input type="checkbox"/> Who will ask members to work project              |
| <input type="checkbox"/> Who will write newsletter article promoting project | <input type="checkbox"/> Who will submit press releases to local media     |

**Other examples**

- |  |   |
|--|---|
| <input type="checkbox"/> Who will buy postage  | <input type="checkbox"/> Who will purchase food and beverages |
| <input type="checkbox"/> Who will create flyer or postcards                                | <input type="checkbox"/> Who will get start-up cash           |
| <input type="checkbox"/> Who will deposit funds after collected at project                 | <input type="checkbox"/> Who will buy decorations             |
| <input type="checkbox"/> Who will send thank you cards to those who assisted with projects |   |

### Example: Membership Social

<p>Sam Jaycee, Chair Somewhere Co. Jaycees 601 Watson Rd. Sunshine, KY 41042 606-371-6666</p>	<ul style="list-style-type: none"> <li>• Chairman.</li> <li>• Secure CPG materials from chapter supply. Write CPG.</li> <li>• Promote project at Board meetings and General Membership meetings.</li> <li>• Solicit manpower, make phone calls about project.</li> <li>• Attend project.</li> <li>• Prepare Sign-In Sheets for chapter members attending the event.</li> <li>• Write newsletter article pertaining to event.</li> <li>• Call members and ask them to invite prospects.</li> <li>• Arrive early and assist with decorations and food preparation.</li> <li>• Greet all in attendance and direct to gathering place.</li> <li>• Introduce prospective members to current members.</li> <li>• Talk to new and prospective members about the chapter and upcoming projects.</li> <li>• Recruit members and assist them in filling out membership applications.</li> <li>• Supervise clean up.</li> <li>• Take photographs and have developed.</li> </ul>
<p>Sally Jones, Membership VP Somewhere Co. Jaycees 6901 Dixie Hwy. Somewhere, KY 987-654-3210</p>	<ul style="list-style-type: none"> <li>• Supervising Officer</li> <li>• Assist in completion of CPG.</li> <li>• Communicate with chapter members about the project.</li> <li>• Make postcards/invitations to send to members and prospects publicizing event.</li> <li>• Obtain postage. Mail postcards.</li> <li>• Secure location for event.</li> <li>• Purchase snacks and food for event.</li> <li>• Obtain decoration and decorate location for event.</li> <li>• Attend project.</li> <li>• Greet prospective members.</li> </ul>
<p>Tammy Jones, President Somewhere Co. Jaycees 30-3 Rio Grande Cr. Sunshine, KY 41042 606-384-4882</p>	<ul style="list-style-type: none"> <li>• Ensure project fits into chapter plan.</li> <li>• Help to make phone calls to chapter members about the project.</li> <li>• Provide membership applications to be used at project.</li> <li>• Provide Chapter Brochures to be given to prospective members. Distribute Brochures to prospective members.</li> <li>• Secure funds with treasurer.</li> <li>• Attend project.</li> </ul>
<p>Pam Miller Newsletter Editor Somewhere Co. Jaycees 1063 Buckland Pl. Sunshine, KY 41042 606-525-7080</p>	<ul style="list-style-type: none"> <li>• Publish article pertaining to project in the newsletter.</li> <li>• Attend project.</li> <li>• Talk to prospective members.</li> <li>• Recruit members if possible.</li> </ul>
<p>Chapter Members Somewhere Co. Jaycees</p>	<ul style="list-style-type: none"> <li>• Invite prospective members to attend project.</li> <li>• Attend Project. Help chair in any way as needed.</li> <li>• Recruit members.</li> </ul>

### Question 4: What specific tools, materials and resources will be needed?

List all materials and supplies that will be needed, from both the chapter and the community to successfully complete this project. Listing each resource, providing detailed contact information (address, telephone numbers, contact person, etc.), and adding a notation if materials are expected to be purchased or donated will assist in preparing.

**Here is a checklist you will need to include for every project.**

- CPG Materials                       Camera, Film & Developing
- Location                                       Sign-In Sheets
- Newsletter Article                       Recruiting Materials (Brochures, invoices, applications, etc.)

**Other things to include, depending on the type of project:**

- Food, Beverages                                       Chapter recruiting brochures
- Chapter sign, banner, creed                                       Money Box
- Postage                                       Chapter Roster
- Letterhead, Stationary                                       Gifts
- Music                                       Items for sale if doing concessions
- Thank-you cards                                       Poster, flyers, post cards
- Invitations                                       Training materials

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

Anticipate potential problems and develop back-up plans or alternate solutions to each problem. Think of problems that may arise in during planning, training, communications, personnel management, and financial management.

**Things to think about:**

- Lack of Public Relations                                       Lack of interest
- Poor attendance                                       Bad weather
- Lack of sponsorships                                       Scheduling Conflicts

**Question 6: Complete a proposed budget indicating all anticipated income and expenses.**

List all anticipated income and expenses.

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

**Example: Community Breakfast**

Income	Proposed	Actual
(Value of Donated items)		
Newsletter Article	5.00	
Camera	50.00	
Flags and Banners	400.00	
Total Donated Items	455.00	
Sponsorship	1000.00	
Registrations (150 @ 15.00)	2250.00	
Chapter appropriation	17.00	
Total Income	3722.00	

Return to chapter (Profit/Loss)	Proposed	
Value of Donated Items	455.00	
Programs	200.00	
Film and Developing	12.00	
CPG Materials	5.00	
Speakers Gifts	100.00	
Decorations and Candy	75.00	
Flowers	75.00	
Invitations and Letterhead	60.00	
Labels	190.00	
Postage	250.00	
Food (150 @ 15.15 per person) Location, microphone, podium, tables, chairs	2300.00	
<b>Total Expenses</b>	<b>3722.00</b>	

### Question 7: List the Specific Steps to bring this project to completion

Prepare a detailed list of what actions are planned or will need to be completed, including dates for each planned action.

**Here are some examples to include for most projects**

- |  |  |
|--|--|
| <input type="checkbox"/> Approve project with board                | <input type="checkbox"/> Report on project at board meetings                             |
| <input type="checkbox"/> Write first 7 questions of CPG            | <input type="checkbox"/> Secure location   |
| <input type="checkbox"/> Obtain CPG materials from chapter supply  | <input type="checkbox"/> Obtain manpower (volunteers)                                    |
| <input type="checkbox"/> Report on project at membership meetings  | <input type="checkbox"/> Write newsletter article and submit to newsletter editor        |
| <input type="checkbox"/> Submit press release to local media       | <input type="checkbox"/> Solicit donations for project                                   |
| <input type="checkbox"/> Secure camera and film                    | <input type="checkbox"/> Invite state board members and other chapters to attend project |
| <input type="checkbox"/> Make phone calls to members about project | <input type="checkbox"/> Take photos and get developed                                   |
| <input type="checkbox"/> Recruit new members                       | <input type="checkbox"/> Complete CPG and submit to board for approval                   |
| <input type="checkbox"/> Submit CPG to state for judging           |  |

**Other examples of items to include for various projects:**

- |   |  |
|---|--|
| <input type="checkbox"/> Buy items for sale at concession booth   | <input type="checkbox"/> Sell items for concessions          |
| <input type="checkbox"/> Obtain corporate sponsors                | <input type="checkbox"/> Print, address and mail invitations |
| <input type="checkbox"/> Buy gifts for special guests, speakers   | <input type="checkbox"/> Set up location                     |
| <input type="checkbox"/> Tear-down, clean-up location             | <input type="checkbox"/> Sell raffle tickets                 |
| <input type="checkbox"/> Pick up suitcases at drop-off locations  | <input type="checkbox"/> Develop new member kits             |
| <input type="checkbox"/> Print chapter brochures                  | <input type="checkbox"/> Swear in new members                |
| <input type="checkbox"/> Obtain Decorations and decorate location |  |

### Question 8: Record any revision of the original plan

Anything that changed in the original plan, steps one through seven, should be recorded and explained. It is important to highlight all changes so that a clear understanding is provided for future chairpersons. Minor changes do not need to be listed, such as a committee meeting held on Tuesday instead of Monday.

**Things to include here:**

- |   |   |
|---|---|
| <input type="checkbox"/> Major Changes in your budget   | <input type="checkbox"/> Unexpected happenings          |
| <input type="checkbox"/> Status of PR received if different than planned                            | <input type="checkbox"/> Major schedule or time changes |
| <input type="checkbox"/> Increase or decrease in number of participants in attendance               |   |
| <input type="checkbox"/> Whether or not vendors that were used were reputable and easy to work with |   |

**Include a final copy of the budget**  
**Example: Community Breakfast**

Income	Proposed	Actual
(Value of Donated items)		
Newsletter Article	5.00	5.00
Camera	50.00	50.00
Flags and Banners	400.00	75.00
Coping, postage, and misc. donated items in lieu of sponsorship (Metzger Eye Care)		200.00
Total Donated Items	455.00	330.00
Sponsorship	1000.00	1200.00
Registrations (150 @ 15.00)	2250.00	2005.00
Chapter appropriation	17.00	
<b>Total Income</b>	<b>3722.00</b>	<b>3535.00</b>
Return to chapter (Profit/Loss)	Proposed	
Value of Donated Items	455.00	330.00
Programs	200.00	134.84
Film and Developing	12.00	5.12
CPG Materials	5.00	5.00
Speakers Gifts	100.00	95.71
Decorations and Candy	75.00	38.23
Flowers	75.00	35.00
Invitations and Letterhead	60.00	20.50
Labels	190.00	29.99
Postage	250.00	(donated)
Food (150 @ 15.15 per person) Location, microphone, podium, tables, chairs	2300.00	2759.80
Glue Sticks		4.20
Return to Chapter Profit		76.61
<b>Total Expenses</b>	<b>3722.00</b>	<b>3535.00</b>

**Question 9: What solutions or recommendations to you have for future chairpersons?**

What changes could have been made that would have made the project more successful? What things made the project successful? Compile a detailed list of recommendations for the next project chairperson.

If you were not available to help next year's chairperson, what advice would you give them?

**Things to include:**

- Timing of project: time of year, amount of time allotted, schedule of events
- Ways to activate more members
- Ideas on improving the impact of the project
- Suggestions on vendors to utilize for resources

**Question 10: Give Specific and measurable results for each goal established**

Describe the impact of the project on the chapter, individual members, and the community. First list each goal from question two and the results for each goal. What were the specific results of each goal? Then describe the impact of the project on the chapter, individual members, and the community. Identify the impact on the committee members, the chapter, and the community as a result of the completion of the project. Only area(s) of impact need to be discussed. Use the opportunity to reach the reader as to why this project should (should not) be run again.

If you fail to obtain a goal, does this mean that your project has failed? Absolutely not! Anytime you complete a project, it is a success.

**Recap your projects goals with measurable results. For example:**

Goal 1: To provide Christmas to 20 of the most needy families in Somewhere County.  
Result: Goal 100% met. The chapter served 20 families and 38 children.

Goal 2: Involve 20 Jaycees in the project.  
Result: Goal 80% met. 16 Jaycees helped with either shopping or delivery of presents.

Goal 3: Raise \$2000 from the community in donations or business sponsorships.  
Result: Goal 110% met. We raised \$2200 from area businesses.

**For Impact include items such as:**

**Impact on the Community:**

- \_\_\_ Number of organizations that benefited
- \_\_\_ Number of can goods donated, suitcases collected, toys delivered, supplies purchased, etc.
- \_\_\_ Money raised for charity
- \_\_\_ Number of members of the community that attended

**Impact on the Individual**

- \_\_\_ Personal Skills that were developed by those in attendance and by the chairperson.
- \_\_\_ Computer Skills/Paperwork skills learned through writing CPG
- \_\_\_ Exposure of members to problems/issues facing the community
- \_\_\_ Networking opportunities
- \_\_\_ Training experience

**Impact on the Chapter**

- \_\_\_ Number of members in attendance
- \_\_\_ Number of new members activated
- \_\_\_ Public Relations exposure gained for chapter
- \_\_\_ Number of members recruited
- \_\_\_ Number of fundraising dollars raised for the chapter

**Example 1: Community Breakfast**

**IMPACT OF THIS PROJECT: ON THE COMMUNITY -**

- ◆ This program provided an opportunity for the community to renew the true meaning of the holiday season. The community learned that the Jaycees care about our community by celebrating our clergy.
- ◆ The community benefited by having information provided to them about the Jaycees.
- ◆ The community benefits from being able to meet local officials at the program. One of these local officials includes the mayor of Sunshine, city council, judges, senators, a candidate for governor, and clergy.
- ◆ Following the program we visited Woodspoint Nursing Home to spread Christmas cheer to the residences.

**ON THE INDIVIDUAL-**

- ◆ Being able to take part in a community event that featured well-known speakers and patriotic singing impacted the individuals that participated in the project.
- ◆ Project raised awareness about the anniversary of the bombing of Pearl Harbor.
- ◆ This project motivated many members who wanted to participate in fellowship with fellow members during the holidays.
- ◆ Helped individual members focus on the true meaning of Christmas.
- ◆ One of the speakers provided us an opportunity to give special thanks for people who have affected their lives. While he sang a song, he asked us to get up and shake hands with someone who had helped us during the year.
- ◆ Reacquaint with friends in the community you may only see once a year.
- ◆ All local and state elected officials were introduced which allowed those in attendance an opportunity to meet their government leaders.
- ◆ The members have the opportunity to meet with their local clergy by participating in the program.
- ◆ Table decorations were given as favors to those who attended.
- ◆ Visiting the nursing home after the project for Christmas caroling was educational into the problems the area elderly face.

**ON THE CHAPTER-**

- ◆ This project impacted the chapter by activating 34 (over 50%) members.
- ◆ Further strengthened relations with the County Businessmen's Association as we worked together on this project.
- ◆ The members were able to get to know each other better and develop a sense of teamwork and cooperation.
- ◆ New member Carolyn was activated to work the registration table.
- ◆ Provided the community with the idea that Jaycees are a strong, established organization. Our organization and local leaders were introduced during the program and our banner was displayed.
- ◆ We promoted our chapter in a positive manner on television and in the newspaper by showing that we are a group of young people active in the community.
- ◆ Provided the public with a renewed sense of the holiday season.

- ◆ County and City officials were in attendance and were impressed with the event and our chapter.
- ◆ Over ten past presidents were in attendance.
- ◆ Chapter can use money raised for more community projects.
- ◆ We enhanced relationships with area clergy.
- ◆ It impacted the state by having five different chapters represented. State officers were recognized during the program.
- ◆ The chapter was granted the bid for this project to become the state spiritual development outing for the 2002 year. The chapter was visited by Allen County, Grayson County, Bullitt County and Covington-Kenton County Jaycees.

## **Tab 2: Financial Management**

Copy of the Final Budget/Financial Statement (must match final budget as it appears in Question 8)

Copies of financial documents (i.e. receipts, invoices, purchase orders, bank statements, etc.)

## **Tab 3: Planning & Training**

A copy of the Chapter Plan for the corresponding Area of Opportunity that details this project

A copy of training materials (i.e. committee reports, committee meeting minutes/agendas, surveys, etc.)

## **Tab 4: Communication**

At least two separate documents (i.e. fliers, newsletter articles, correspondence, notes, thank you cards, chapter mailings, etc.)

## **Tab 5: Personnel Management**

Sign In Sheet or project interest sheet

Completed membership applications for any members recruited. (If no members were recruited, a copy of a blank membership application or the statement: "No members Recruited" must be included)

## **Tab 6: Public Relations**

At least 2 separate items that document how the project was promoted (i.e. news release, news clipping, script, etc.)

## **Tab 7: Photographs**

Copies or actual photographs with a label of what activity are taking place in the photo.