

# Chairman's Planning Guide

Project Name: \_\_\_\_\_

## Part 1: PLANNING

- 1. PRIMARY PURPOSE:** (A brief statement giving the one reason why the chapter wants to conduct this project.) **STOP:** Ask the question, is this a new project or a recurring project?

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- 2. GIVE A BRIEF DESCRIPTION OF THE PROPOSED PROJECT AND BACKGROUND INFORMATION.** (Summarize the concept of the proposed project — the who, what, or how that provided the idea — and briefly describe the desired results. Explain how this proposed project relates to the chapter's objective, priorities, and goals.)

### CHAPTER OBJECTIVES AND GOALS:

This project falls under the following areas of the \_\_\_\_\_ Jaycees Chapter Plan Chapter Pinnacle Award Area of opportunity: \_\_\_\_\_

PROPOSED PROJECT: \_\_\_\_\_  
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BACKGROUND INFORMATION: \_\_\_\_\_  
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**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. Goal 1 must match the primary purpose.)

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

Goal No. 1: \_\_\_\_\_

\_\_\_\_\_

Goal No. 2: \_\_\_\_\_

\_\_\_\_\_

Goal No. 3: \_\_\_\_\_

\_\_\_\_\_

Goal No. 4: \_\_\_\_\_

\_\_\_\_\_

Goal No. 5: \_\_\_\_\_

\_\_\_\_\_

Goal No. 6: \_\_\_\_\_

\_\_\_\_\_

Goal No.7: To complete CPG by \_\_\_\_\_ .

- 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) has not yet been selected, list specific responsibilities, talents, skills, knowledge or abilities that person(s) will need to possess.)

SUPERVISING CHAPTER OFFICERS - usually only one

**Chairman of the Board:** -----  
**Address:** -----  
Honolulu, HI 96 \_\_\_\_\_  
**Phone:** (h) \_\_\_\_\_ (w) \_\_\_\_\_  
**Duties:** To give assistance to the President, the Board of Directors, the Chairman and the committee members. To provide additional assistance through the Hawaii Jaycees.

**President:** -----  
**Address:** -----  
Honolulu, HI 96 \_\_\_\_\_  
**Phone:** (h) \_\_\_\_\_ (w) \_\_\_\_\_  
**Duties:** To include project information in meetings agendas. To give assistance to the Vice Presidents and their committee members. To provide additional assistance through the Hawaii Jaycees.

----- **Development Vice President:** -----

**Address:** -----  
Honolulu, HI 96 \_\_\_\_\_  
**Phone:** (h) \_\_\_\_\_ (w) \_\_\_\_\_  
**Duties:** The \_\_\_\_\_ Development Vice President will provide assistance and consultation in the \_\_\_\_\_ Development area as the Supervising Chapter Officer for the Project. The \_\_\_\_\_ Development Vice President will define and monitor the goals of the project and serve as a liaison to the Executive Committee. Will promote the project in the chapter newsletters, at General Membership Meeting and at new member orientations.

----- **Development Director:** -----

**Address:** -----  
Honolulu, HI 96 \_\_\_\_\_  
**Phone:** (h) \_\_\_\_\_ (w) \_\_\_\_\_  
**Duties:** The \_\_\_\_\_ Development Director will provide assistance and consultation in the \_\_\_\_\_ Development area as the Supervising Chapter Officer for the Project. The \_\_\_\_\_ Development Director will define and monitor the goals of the project and serve as a liaison to the Executive Committee. Will promote the project in the chapter newsletters, at General Membership Meeting and at new member orientations.

PROJECT MEMBERS

**Chairperson:** -----  
**Address:** -----  
Honolulu, HI 96 \_\_\_\_\_  
**Phone:** (h) \_\_\_\_\_ (w) \_\_\_\_\_  
**Duties:** Coordinate and organize the planning and implementation of the project. Will oversee the entire project including preparation and update of the Chairman's Planning Guide. Conduct Committee meetings.

----- : Name: -----  
**Address:** -----  
Honolulu, HI 96 -----  
**Phone:** (h) ----- (w) -----  
**Duties:** -----  
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----- : Name: -----  
**Address:** -----  
Honolulu, HI 96 -----  
**Phone:** (h) ----- (w) -----  
**Duties:** -----  
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**Treasurer:** -----  
**Address:** -----  
Honolulu, HI 96 -----  
**Phone:** (h) ----- (w) -----  
**Duties:** To withdraw/cut checks for initial project expenses, reconcile money collected, reimburse expenses to members and deposit money left over funds back into chapter account.

**Newsletter Editor:** -----  
**Address:** -----  
Honolulu, HI 96 -----  
**Phone:** (h) ----- (w) -----  
**Duties:** Will be responsible for editing and type setting all newsletter articles that are written in the chapter newsletter. Responsible for adding a copy of the flyer in every newsletter.

**4. WHAT SPECIFIC MATERIALS, SUPPLIES AND RESOURCES WILL BE REQUIRED?** (List all materials and supplies that will be needed, from both chapter and community resources, to successfully complete this project. List each resource, providing detailed contact information ie. address, telephone numbers, contact persons, etc. adding a notation if materials are expected to be purchased or donated, which will assist in preparing a budget later.)

Donated Materials and/or Supplies:

Materials/Services/Supplies	Resource/Contact Info	Est. Donated Value
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-----	-----	-----
-----	-----	-----

Purchased Materials and/or Supplies:

Materials/Services/Supplies	Resource/Contact Info	Est. Donated Value
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-----	-----	-----
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- 5. DESCRIBE THE POTENTIAL PROBLEMS AND SOLUTIONS TO SUCCESSFULLY COMPLETE THIS PROJECT.** (Anticipate potential problems and develop back-up plans or alternate solutions to each problem. For best results, examine problems by management technique areas of planning, training, communications, personnel management, and financial management.)

PLANNING:

Potential Problem:

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Possible Solution(s):

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TRAINING:

Potential Problem:

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Possible Solution(s):

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PERSONNELMANAGEMENT:

Potential Problem:

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Possible Solution(s):

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COMMUNICATION:

Potential Problem:

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Possible Solution(s):

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FINANCIAL MANAGEMENT

Potential Problem:

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Possible Solution(s):

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Potential Problem: Initial costs associated with project.

Possible Solution(s): Ask Chapter for \$\_\_\_\_\_ to fund project.

Solicit Donations

Evaluate chapter resources

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- 6. COMPLETE A PROPOSED BUDGET INDICATING ALL ANTICIPATED INCOME AND EXPENSE.** (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 valued donated items (goods and services). List all anticipated income and expenses.)

**INCOME**

Approximate Amount Value

Appropriation from Chapter

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Chapter donated services/supplies (itemize)

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Non-Chapter donated services/supplies (itemize)

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Additional proposed income (itemize)

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**TOTAL INCOME**

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**EXPENSES**

Approximate Amount Value

Appropriation from Chapter	-----
Chapter donated services/supplies (itemize)	-----
Non-Chapter donated services/supplies (itemize)	-----
Purchased services/supplies (itemize)	-----
Return of appropriation from chapter:	-----
Return to chapter (Profit)	-----
<b>TOTAL EXPENSES</b>	-----

**7. LIST THE SPECIFIC STEPS TO BRING THIS PROJECT TO A SUCCESSFUL COMPLETION SHOWING PLANNED DATES FOR EACH STEP** (Prepare a detailed list of what actions are planned or will need to be completed, including dates for each planned action.)

<u>Date</u>	<u>Projected activity/action needed to be completed by date assigned</u>
__ / __ / 03	Idea discussed for Project
__ / __ / 03	Accept Chairpersonship
__ / __ / 03	Meet with supervising chapter officer/director/other
__ / __ / 03	Evaluation of Proposed Project.

New or Recurring project?

Recurring project:

- Find and look at the last CPG written on the project.
- Evaluate: is the real need still there or the same?

How can this project be improved?

- Anticipate any major/minor changes to the last CPG written?

New Project:

- Gather all data and basic info available
- Purpose of the project
- Goals to be accomplished
- Net cost to the chapter
- Estimate income to chapter
- Members needed to serve on the committee
- Members needed to participate in project

__ / __ / 03	-----
__ / __ / 03	-----
__ / __ / 03	Begin writing the first CPG questions 1-7.
__ / __ / 03	Present the CPG questions 1-7 to the Board of Directors of the _____ Jaycees. Ask for appropriation from chapter if any.
__ / __ / 03	-----



PROBLEMS AND SOLUTIONS? \_\_\_\_\_  
\_\_\_\_\_

CHANGES IN STEPS, DATES AND TIMES?

\_\_ / \_\_ / 03 \_\_\_\_\_  
\_\_ / \_\_ / 03 \_\_\_\_\_  
\_\_ / \_\_ / 03 \_\_\_\_\_  
\_\_ / \_\_ / 03 \_\_\_\_\_

**9. LIST SOLUTIONS OR RECOMMENDATIONS DO YOU HAVE FOR FUTURE CHAIRMAN?** (What changes were done or could have been made that would have made the project more successful? Compile a detail list of solutions or recommendations for the next project chairperson.)

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_
- 4) \_\_\_\_\_
- 5) \_\_\_\_\_
- 6) \_\_\_\_\_
- 7) \_\_\_\_\_

**10. GIVE SPECIFIC AND MEASURABLE RESULTS FOR EACH GOAL ESTABLISHED.** (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.)

Goal No.1: \_\_\_\_\_  
\_\_\_\_\_

Results: \_\_\_\_\_  
\_\_\_\_\_

Conclusion: the goal was (not) attained and surpassed

Goal No.2: \_\_\_\_\_  
\_\_\_\_\_

Results: \_\_\_\_\_  
\_\_\_\_\_

Conclusion: the goal was (not) attained and surpassed

Goal No.3: \_\_\_\_\_  
\_\_\_\_\_

Results: \_\_\_\_\_  
\_\_\_\_\_

Conclusion: the goal was (not) attained and surpassed

Goal No.4: \_\_\_\_\_

Results: \_\_\_\_\_

Conclusion: the goal was (not) attained and surpassed

Goal No.5: \_\_\_\_\_

Results: \_\_\_\_\_

Conclusion: the goal was (not) attained and surpassed

Goal No.6: \_\_\_\_\_

Results: \_\_\_\_\_

Conclusion: the goal was (not) attained and surpassed

Goal No.7: \_\_\_\_\_

Results: \_\_\_\_\_

Conclusion: the goal was (not) attained and surpassed

**DESCRIBE THE IMPACT OF THIS 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.) Note: not every project will have impact on each of the 3 areas below.

**Impact of this Project on the Chapter.**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Impact of this project on the Individual Members.**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Impact of this project on the Community.**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_