

Using the Chairman's Planning Guide (CPG) for Projects Involving the Virginia Jaycees Foundation

The Chairman's Planning Guide is a series of questions designed to guide the project chairperson and the members of the committee through the process of running the project.

1. **Primary Purpose.** A brief statement giving the one reason the state wants to conduct this project.
 - a. Include the specific time and project this CPG will cover.
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 — the who, what, or how that provided the idea — and briefly describe the desired results. Explain how this proposed project relates to the state's objective, priorities, and goals. 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. Goal A must match the primary purpose.

 - a. Don't use the terms "at least" or "more than", etc. Be specific...."Have three competitors per category" instead of "Have at least two competitors per category".
 - b. Include goals like number of chapters to involve, amount of money to be raised, number of corporate sponsors.
 - c. Include how the Foundation will be involved in the project. Will this just be a flow-through for contributions? Is the State asking the Foundation to match all contributions and, if so, in what proportion?
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.
 - a. Who is the Program Manager? Who is the VP who will supervise the project? Who is the State President? Provide contact information as well as names.
 - b. If using the Foundation, include Foundation President and Treasurer.
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. 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 a budget later.
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.
6. **Complete a proposed budget indicating 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). List all anticipated income and expenses.
 - a. **THE BUDGET MUST BALANCE!**
 - b. Include donated items as income and expense.
 - c. Include the TOTAL value of an item, not just what the program will pay for; i.e., airfare, registration fees, etc. See addendum about financial aspects of program.
 - d. If requested, include Foundation match as income.
 - e. CPG should indicate how funds will be used in order of preference if a) fewer funds are collected to meet the goal expenses, or b) more funds are collected than what is required to meet the stated goal expenses.

- 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.
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Steps 8, 9 and 10 are not to be submitted unless presenting a progress or final report.

- 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 modifications so that a clear understanding is provided for future chairpersons.
- 9. What solutions or recommendations do you have for a future chairperson?**
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.
- 10. Give specific and measurable results for each goal established.**
Describe the impact of the project on the state organization, 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 state organization, 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.

FINANCIAL TIPS FOR A SUCCESSFUL COMPETITIONS PROGRAM

Working with the Foundation involves needing to follow specific guidelines to stay in compliance with tax laws. Trustees are very willing to assist to make the project successful.

1. No fundraising may occur for this project until it has been approved by the Foundation Board of Trustees. The CPG should be presented no later than the January board meeting.
2. All contributions must be sent to the Foundation Treasurer as soon as possible. Use the deposit forms available from the Foundation Treasurer to make your deposit. A list of cash donors or in-kind donors must be kept and submitted with the funds. Any checks for the project **MUST** be made out to the Virginia Jaycees Foundation. The Foundation cannot accept any contributions made out to a chapter, specific individual or the Virginia Jaycees.
3. Whenever possible, the Foundation prefers to pay expenses directly. The Foundation Treasurer can pay registration fees, competition fees, or hotel expenses directly to the vendor. Appropriate notice and information must be given to the Treasurer.
4. If prepayment cannot be done, reimbursements will be made at each appropriate Board meeting. **NO** reimbursement will be made without proper receipt.
5. Funds must be on deposit for at least 10 days before reimbursement can be made on those funds.

OTHER TIPS AND SUGGESTIONS

1. The Program Manager or VP should be prepared to give a progress report at each Foundation meeting and if/when asked by the Foundation President.